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Massachusetts Department of Public Welfare

Alexander E. Sharp Commissioner

Statistical Supplement to the Annual Report

1234567

Fiscal Year 1978

STATISTICAL SUPPLEMENT TO THE ANNUAL REPORT

FISCAL YEAR 1978

Department of Public Welfare

John Pratt, Commissioner

Office of Finance

Division of Federal Revenue

A Report Prepared by

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Director of Research

April, 1978



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Massachusetts Public Welfare in Fiscal Year 1978

Overview

The report which follows will describe in statistical terms, using charts and tables, the number of cases and persons aided by the Department of Public Welfare. The recipients will be described by welfare program, over time, but especially for the Fiscal Year 1978. The expenditures made by the Department for these persons will also be described. The analysis will include comparisons with past data and comparisons with other programs and other states during the same time span. In most cases the time period will be Fiscal Year 1978 but this year will be compared to other time periods and any differences or changes will be described if the cause is known. The complete report is designed to inform the interested citizen and administrator and to serve as a useful source of welfare data for other agencies, both government and private, and the business community when used in conjunction with the Department's Annual Report.

Expenditures

Total expenditures for public welfare in Massachusetts in Fiscal Year 1978, after adjustments, were \$1,438,976,000. Of this sum, 44.4 percent was for Assistance Payments, 43.5 percent for Medical Services and Supplies, 5.9 percent for Administration and 6.2 percent for Social Services, including Child Welfare.

Compared to the year before, total expenditures were up 24.6 million dollars or 1.7 percent. In Fiscal Year 1978, about 52 percent of the total expense for welfare was reimbursed by the Federal Government in the form of matching funds or grants which reached 748 million dollars. When total expenditures are adjusted for price changes we find

that without the increase in prices over the year expenditures would have actually declined in Fiscal Year 1978. This was because prices as measured by the Boston Consumer Price Index rose faster than the increase in welfare expenditures.

Expenditures for all programs combined have continued to increase each year as the total caseload increased as well as prices. While 774.2 million dollars was spent for all the programs combined in Fiscal Year 1972, (not including social services and administration), over 1265.7 million dollars was spent for the same programs six years later or in Fiscal Year 1978.

Of all the major programs, Medical Assistance was the largest in money terms. Compared to the year before, expenditures under this program were up 1.8 percent or 12.5 million dollars. Over the five year period, 1974 to 1978, this program had an increase of 163.3 million dollars and the percent increase in expenditures was 35.5. The increase in AFDC expenditures over the same period, in percentage terms however was higher, 50.5 percent. Perhaps the most significant change in recent years was the decline in General Relief expenditures and in Fiscal Year 1978 they fell to the level where they were in 1970. In Fiscal Year 1978, GR expenditures were only half of what they were five years earlier.

In conclusion it was found that expenditures in Fiscal Year 1978, while increasing slightly or less than 2 percent, were under control and did not rise to the level that would be expected based on increases over the past five years and based on price increases in the past few years.

Caseloads

In Fiscal Year 1978 over 350,000 cases were aided in an average month. As in the year before all the programs except General Relief, the Aged-SSI program and the Medical Only program for Children Under 21 Years of Age had an increase in the number of cases aided. The declines in these programs were not enough to affect the gains in the other programs however, as they did in the previous fiscal year, and an increase of 3,349 cases in the total caseload was experienced. The increase of one percent was mostly due to an increase in basic AFDC and SSI disabled cases.

The largest caseload increase in percentage terms was found in the program for AFDC-Related (Medical Only) cases which with a relatively small caseload increase had a high percentage increase, (20.7%). Another large percentage increase was reported for the Medical Only-Disabled program which increased 12 percent or 1,044 cases per month.

In Fiscal Year 1978 the decline in the number of medical only cases with children under 21 was 2,130 or 10.7 percent and the Aged-SSI caseload also declined with each month, on the average, having 3,723 fewer cases than in the average month in the prior year. The General Relief program, which fell 965 cases each month on the average also had decline in absolute terms.

The total number of cases aided each month averaged 351,524 with 639,755 people in these cases. At this level it was back up to the point reached in 1976 (F.Y.) In Fiscal Year 1977 the caseload was 348,175. In F.Y. 1978 this meant an increase of 3,349 cases each month of the year.

The Aged-SSI monthly caseload was 73,224 in Fiscal Year 1978 or down 3,723 cases from the prior year's average while the Disabled-SSI monthly average caseload increased 2,610 cases from the preceding year to 55,286 cases on the average each month.

Of the six public welfare regions, the Lawrence Region was the largest in June 1978, based on the total caseload, (47,477), closely followed by the Boston Region, (47,465). Due to a small increase in the number of cases in the Lawrence Region and a small decline in the number of cases in the Boston Region their relative positions switched in Fiscal Year 1978. The third largest region was New Bedford with 37,603 cases in June 1976.

In Fiscal Year 1978 the number of applications received per month for all programs, (SSI applications are processed by the Social Security Administration), was equal to about 6.4 percent of the average monthly caseload. Each month 14,332 applications were received for the programs having an average monthly caseload of 222,618.

About two-thirds of the applications were approved for assistance in the 1978 fiscal year. Under the AFDC program about three-quarters of the approved applications were for new rather than reopened cases, (cases which had received assistance in the past six months), and only one-fifth of the GR cases were reopened.

Medical Assistance

Total Medical Assistance payments reached \$721.1 million in Fiscal Year 1978 including \$94.5 million for the aged in mental hospitals and the retarded in Intermediate Care Facilities. An additional \$8.9 million was paid in premium payments to the Social Security Administration for Supplementary Medical Insurance under Medicare

(Title XVII), and to a Health Maintenance Organization. Almost the the total medical expenditure was matched on a 50-50 basis by the Federal Government.

Compared to the year before, the Department's expenditure for medical care was up 1.8 percent or 12.5 million dollars, with most of the increase due to the expansion of medical services to be re-tarded (\$15.2 million) and rate increases for cases receiving institutional care in hospitals and Nursing Homes. These increases were slightly offset by a drop in medical expenditures under General Relief.

Payments to acute and chronic hospitals accounted for 261 million dollars and over 36 percent of the total medical expenditures. This was down about a million dollars from the expenditures for this type of care in Fiscal Year 1977. Other institutional care accounted for an additional \$280.2 million so that together inpatient care accounted for 541.2 million dollars or three-fourths of the total expenditure for medical care in Fiscal Year 1978. Compared to 1977; while the expenditures for this type of care is up slightly, as a percentage of total medical expenditures the percentage is down 1.8 percent.

The number of persons eligible for medical assistance is down slightly, from 642,665 to 639,755 people. The largest percentage of the total eligible recipients are also receiving AFDC benefits while almost 116,000 are aged persons under SSI or Medical Only programs.

The average monthly payment per eligible person ranged from \$13.01 for a person also receiving cash assistance under General Relief to \$669.72 per month for a person under the Medical-Only Disabled program, in Fiscal Year 1978. For all the programs the average payment

per month per person was \$93.53. For persons in family cases the average ranged from \$30.82 to \$61.26.

For all the programs, of the average number of eligible recipients each month (639,755) only 380,295 actually had at least one medical payment made for them in the average month, or 59.4 percent of the eligible persons. Except for the Aged and Medical Only-Disabled cases, between 50.9 and 62.8 percent of the eligible persons had a payment made for them. Almost all the Aged and DA Medical Only cases had a payment made for them, and when payments for closed cases were included, the utilization rate was greater than 100 percent.

Expenditures for medical care in Massachusetts, based on data for April, 1978 were the eighth highest in the nation, while a year earlier they were sixth highest. At over 63 million dollars per month they were about a quarter of the expenditures for medical care in New York, (279 million per month under Title XIX); (and less than expenditures in California, Pennsylvania, Michigan, Illinois, Texas and Ohio.)

Income Maintenance

The number of persons being aided under the AFDC program increased only 0.1 percent from Fiscal Year 1977 to Fiscal Year 1978, while the number of persons aided under the GR program fell 4.4 percent in the same time frame. At the same time the number of Public Assistance cases using food stamps increased from 104.3 thousand in July 1977 to 107.3 thousand in June 1978. The number of non-public assistance food stamp cases increased over the year and reached a high point in February 1978 during and shortly after the "Blizzard of 1978" and

other inclement weather with 116.7 thousand cases. By June 1978 however the non-public assistance food stamp caseload was down to about 69 thousand cases.

The number of Aged-SSI cases also declined in the fiscal year while the number of SSI-Disabled cases continued to increase over the fiscal year with a total net decrease for both programs of 1,113 cases. The average number of Disabled SSI cases in Fiscal Year 1978 was up 5 percent from the average number the year before.

To explain these changes in more detail, we find that the small drop in GR cases comes after two large declines in Fiscal Years 1976 and 1977. A decline in expenditures of over 9.3 percent went along with this drop in caseload plus a decrease in medical payments for services incurred in the periods before the decline in caseload. Compared to other states, the average direct payment to General Relief recipients in Massachusetts was low. Not only was the average payment in June 1978 below the average for all states (\$156.17), but at \$149.31 it ranked tenth in the nation. States with a higher average payment in that month include; Hawaii, with the highest, New York, Rhode Island, New Jersey and Michigan. The average monthly caseload being aided under the AFDC program increased 3.3 percent or 3,931 cases each month in Fiscal Year 1978, compared to Fiscal Year 1977. Total expenditures increased 5.2 percent due to the increased caseload, principally.

The increase in caseload and expenditures was relatively modest and in fact the increase in the basic caseload was the smallest in the last ten years. The Unemployed Fathers segment of the total AFDC caseload increased only 4 percent while the basic or remainder, only

3.3 percent; both lower than the percentage increase from 1976 to Fiscal Year 1977. The caseload increase in Fiscal Year 1978 for both groups was the smallest ever, in percentage terms, since the Commonwealth assumed administration of the AFDC program in Fiscal Year 1968.

The average payment per case in Massachusetts under the AFDC program was the fourth highest in the nation in June 1978 after adjustments were made for the quarterly grant. In June, 1977 Massachusetts had the third highest payment. The average payment of \$319.63 compares with the average for all the states of \$250.79, the highest or Hawaii's at \$377.34 or New York with the second highest at \$375.09.

Total expenditures for the SSI programs declined 1.7 percent or 12 million dollars (state share), as the caseload declined about 1 percent. The 1.7 percent decrease brought expenditures down to \$112.1 million. (They were \$114 million in F.Y. 1977). Average payment per month decreased 0.8 percent per month, (From 7,329 in F.Y. 1977 to 72 69 in F.Y. 1978) due to the increased income resources of the clients. While the overall caseload declined 0.9 percent there was a great difference between the Aged segment and the Disabled segment of the total caseload. The aged portion actually showed a decline of 4.8 percent which was more than offset by the 5.0 percent increase in the Disabled portion. These changes brought the average Aged caseload to 73,224 from 76,946 recorded in the year before and the Disabled caseload to 55,286 from 52,677 the year before.

It appears that the Disabled portion of the total caseload is increasing due to changes in the definition of who is disabled along

with improved outreach and inflationary factors that made pensions and other financial plans for the disabled clients outmoded. The decline in the Aged portion reflects improved social security and other pensions and benefits in amount and coverage.

Food Stamps

The total value of food stamps utilized remained relatively stable each month in fiscal year 1978, (between 20.2 and 22.5 million dollars) except during the inclement weather experienced in February and March 1978, when the total value of stamps utilized reached 25.0 million dollars in February 1978. In March the value fell off to 23.7 million dollars and then fell back to the normal 20 plus million dollars worth of stamps from April on.

For all cases, over 264 million dollars in food stamps were utilized in Fiscal Year 1978, with a bonus value, or net gain to the clients of 154.2 million dollars. An average 106,815 Public Assistance cases and 80,752 non-public assistance cases actually utilized their authorizations to purchase food stamps each month during the fiscal year with an average net gain of \$68.54 each month for each case.

Social Services

Expenditures for Social Services in fiscal year 1978 declined about 1.8 million dollars from the expenditures in Fiscal Year 1977 and were in total 89.5 million dollars. The decrease was mostly due to the transfer of services for the Aged to the Office of Elder Affairs but expenditures for Day Care and Family Services also declined offsetting large increases in the programs for Children in

Crisis, Protective Services and a reinstated program for the tuition and transportation of children (under the care of the Department).

As in the year before, the Care and Maintenance of Children under the supervision of the Department took the largest portion of total social service expenditures. These expenditures accounted for 42.1 percent of the total. Day Care accounted for 29.6 percent of the total and at 26.5 million dollars was down 1.3 million from the Day Care expenditures in Fiscal Year 1977. Services for the Aged and Disabled dropped about 8 million dollars as the responsibility for providing homemakers and chore service workers was transferred to the other agency along with other services.

Expenditures under the Donated Funds program increased slightly from Fiscal Year 1977 to Fiscal Year 1978 and was the third largest social service program financed by the Department. While expenditures for the Care and Maintenance program increased 2.7 million dollars in Fiscal Year 1978 from Fiscal Year 1977 only a small portion was spent for medical services and supplies. This decline however was offset by an increase in Board (Foster Care and Group Care) rates and payments and clothing. These increased payments reflected a higher ratio for group care facilities and other inflationary tendencies not just the cost of food.

Not included in the social services section of the report, but allied to the social service delivery system were the expenditures from the Aid to Families with Dependent Children's account for the Work Incentive Program.

Just under \$750,000 was spent in an effort to increase the participation of AFDC mothers, fathers and older children in work and work training programs. This includes on-the-job training and actual employment in the economy. In 1978 this resulted in over 10 thousand clients gaining employment with an annual savings to the Department of over 25.4 million dollars.

To enable the clients to leave their families for the work or training environment, the social services unit is required to provide the necessary day care and homemaker services to the WIN participants.

Administration

Total administrative costs were 84.9 million dollars in Fiscal Year 1978 or 7.5 million dollars higher than the year before. Almost all of the increase was accounted for by regular administration, which is greatly affected by inflation, but additional training expenses and greatly increased food stamp administrative costs also helped push up the total.

Expenditures for the Hospital Admission Surveillance System dropped appreciably as they did in the prior year but expenditures for the administration of the Food Stamp Program rose to an all time high. Expenditures for the latter unit increased from 5.5 million dollars in Fiscal Year 1977 to 7.0 million dollars in Fiscal Year 1978.

While the increase in administrative costs for the Child Support Enforcement Unit increased almost 50 percent or \$600,000 the revenue from the absent parents also increased in Fiscal Year 1978 from F.Y. 1977. The increase was just under 4 million dollars.

Sources of Data

Monthly Summary Expenditure Report: A computer printout giving the unadjusted public welfare expenditures by program, including the quarterly grant and the unduplicated count of cases and recipients, by program, who received a payment or were eligible to have a payment made for them in the month.

Status of Appropriation Accounts: Monthly financial report of the Department of Public Welfare giving the funds appropriated and allocated for the year to date with encumbrances and balances for each account. The June report is used for this supplement with appropriate report on accounts payable from the previous year.

Consumer Price Index: A series published by the U.S. Department of Labor, Bureau of Labor Statistics, Quarterly, for Boston showing changes in price levels for goods and services purchased by an average defined family.

RS-I Series: A series of reports on caseload and expenditures, manually produced and processed, from data submitted by the local welfare offices prior to April 1972.

Public Assistance Statistics Report A-2: Published by the U.S. Department of Health, Education and Welfare giving welfare data by state and for the nation as a whole, especially caseload and expenditure data. Produced by the ORS at present, a unit of the Social Security Administration. Pub. #78-11917.

Federal Report 8700: The only available source of the caseloads under the Supplemental Security Income Program. It is produced by the Social Security Administration, DHEW on a monthly basis.

Form NCSS-120: A monthly report sent to DHEW showing the caseload and medical expenditures by type and by program. The data submitted is generally from the Computer Report VPS-07 with adjustments and gives preliminary data, hence estimated.

Medicaid Data (Medical Assistance financed under Title XIX of the Social Security Act) DHEW Publication #03150 (HCFA-1977 SRS-1976) April 1976 and April 1977. A publication showing medical expenditures under Title XIX by state, monthly.

FNS-256; Food Stamp Participation Report: An IBM printout showing the amount of food stamps actually purchased by the eligible recipients and the total purchase price. This differs from other reports that show the value of authorizations or amount of stamps that could be purchased.

Raymond Trial Balance Book: Fiscal Year 1977 Trial Balance Account Book giving the expenditures and accounts payable by object code for child welfare accounts and which must be reconciled to the Status of Appropriation Account Report, eventually.

Revenue by Fiscal Year: Actual and Estimated Revenue of the Department of Public Welfare on an unnumbered form prepared by the Finance Division. Data is usually by revenue account by program.

CASELOAD AND EXPENDITURES

Total Expenditures - Fiscal Year 1978

In the Fiscal Year 1978 total expenditures by the Massachusetts Department of Public Welfare were \$1,405,388,122. When we add the accounts payable from the previous year, (1977 appropriated funds paid out in fiscal year 1978), total funds disbursed in the Massachusetts economy equaled \$1,438,976,001. This grand total figure can somewhat arbitrarily be broken down under four general headings as follows:

Income Maintenance - Public Assistance	\$639,203,592
Medical Services and Supplies	626,532,050
Social Services including Child Care	88,358,603
Administration including Food Stamps	<u>84,881,756</u>
Grand Total Expenditure	\$1,438,976,001

The various sections that follow in this report will treat each of these major segments in turn. Compared to the previous fiscal year, total expenditures were up 24.6 million dollars or 1.7 percent. This comes after an increase of 7.9 percent in expenditures from fiscal year 1976 to fiscal year 1977. All major divisions except social services shared in this 1.7 percent increase but Income Maintenance accounted for the greatest gain in absolute terms and Administrative Costs in percentage terms.

The accounts payable portion included over \$15 million in medical payments and \$11.6 million for social services, including Day Care, the care and maintenance of children, donated funds and the tuition and transportation of children in care.

Before we analyze the year to year changes in expenditures and caseload by program we should consider at least two outside factors that have a direct bearing on the magnitude of total expenditures that have to be financed by the taxpayers of Massachusetts. The first factor that helps determine the total amount the Welfare Department has to distribute is price changes as reflected by the Boston Consumer Price Index. The second factor is the matching funds provided by the Federal Government and other revenue such as child support payments and donated funds that help determine the burden actually placed on the taxpayers of Massachusetts by the Welfare Department.

Revenue Estimates for Fiscal Year 1978

In the Fiscal Year 1978, the Massachusetts Welfare Department received just under 748 million dollars as revenue from various sources with about 93 percent of the total coming from the federal government as grants and matching funds.

By far the largest percentage of the total revenue was in the form of matching funds with the federal share based on the total expenditures under a particular program. An additional 29 million dollars was received for child support from fathers of children receiving aid under the various programs, especially AFDC, and over 2.7 million dollars was received from agencies participating in the Donated Funds program.

The federal government, under the matching formula, reimburses the state for 50 percent of most administrative costs and the same percent for expenditures under the Aid to Families with Dependent Children (AFDC) program and most medical expenditures under Title XIX of the Social Security Act. Most social services are matched at 75 percent. There is no federal matching for expenditures under the General Relief program or the two sections of the Supplemental Security Income (SSI) program, (Aged and Disabled). Expenditures by the Commonwealth for SSI are made after the Social Security Administration has distributed the total SSI payment, which includes both the state and federal share of the total payments.

The table on the next page describes the revenue received by the Department in Fiscal Years 1977 and 1978 with the year-to-year percent change in revenue for each major program area. The increase of almost 88 million dollars or 13.5 percent was essentially due to the increase in matching funds for Medical Assistance expenditures which increased 15.9 percent or 48 million dollars.

With the increase in matching funds, the total revenue received in Fiscal Year 1978 was almost 52 percent of the total expenditures in Fiscal Year 1978 (1.4 billion dollars).

Except for the decline in food stamp administration revenue, all the other major program areas had a revenue increase in Fiscal Year 1978. Support payments by absent parents increased almost four million dollars or 15 percent which reflects the increased efficiency of the Child Support Enforcement Unit, but Donated Funds, the only other major source of non-federal funds, increased only 100,000 dollars or 3.6 percent.

The largest increase in revenue, in percentage terms, was for the training programs, which increased 30 percent to just under 2.5 million dollars. Other large increases, after medical assistance, include a 13.1 percent increase in revenue for social services (\$9 million), a 9.9 percent increase for assistance payments, (\$23 million) and a 24.7 percent or 4 million dollar increase in other revenue which included recoveries and federal matching for the WIN registration program.

**Federal Reimbursements and Other Revenue
Fiscal Years 1978 and 1977, by Major Areas,
and Year to Year Percent Change, Massachusetts**

<u>Major Area</u>	<u>Funds Received</u>		<u>Percent Change</u>
	<u>Fiscal Year 1978</u>	<u>Fiscal Year 1977</u>	
	(000)	(000)	(%)
Assistance Payments	\$254,226	\$231,276	+ 9.9
Social Services	81,762	72,300	+ 13.1
Medical Assistance	351,780	303,555	+ 15.9
Food Stamp Program	4,055	4,448	- 8.8
Child Support	29,161	25,356	+ 15.0
Donations for Services*	2,704	2,609	+ 3.6
Training	2,486	1,912	+ 30.0
Miscellaneous & Other	21,740	17,431	+ 24.7
 Total, All Revenue	 \$747,916	 \$658,887	 + 13.5

* Non-Federal Share

Source: General Revenue Statement, Division of Finance, Dept. of Public Welfare

Estimated Payments After Price Adjustments

The chart appearing on the next page has been prepared to show the effect of price changes on total welfare expenditures. Using the Consumers Price Index for Boston for wage and clerical workers, total medical and assistance payments have been adjusted for price changes. As a result we have an estimate of what total expenditures might have been if price increases had not taken place over the nine year period.

With a base of 1967 (when the C.P.I. was 100 and total payments for medical services and assistance payments were 259 million dollars), we find that if prices did not rise, expenditures for the same programs in Fiscal Year 1978 would be expected to reach about 675 million dollars or down from the 696 million dollars that we would have expected for the prior fiscal year, 1977, rather than the 1266 million dollars actually expended in F.Y. 1978 up from the 1246 million actually expended in the year before.

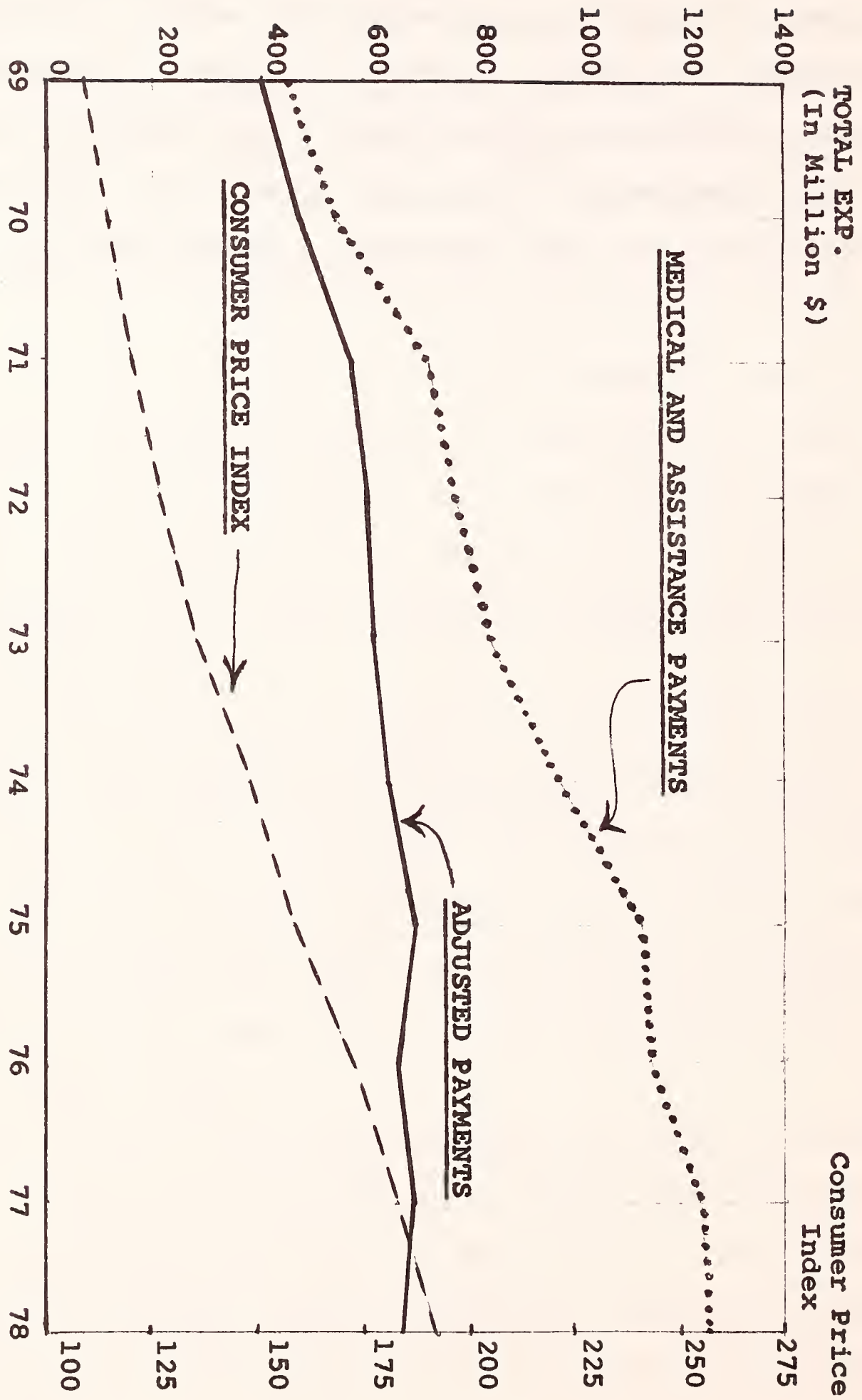
Expenditures for welfare continued to increase at a rate higher than the price index would indicate each year in the 1969-1971 period. Since 1972 however, total expenditures increased at a rate only slightly higher than the rise in prices and in Fiscal Year 1976 the percentage increase in expenditures was far below the increase in prices. This was also true in Fiscal Year 1978, but last year expenditure led prices by a slight amount.

The rise in prices not only influences the need for increases in assistance payments and higher prices for each medical service but indirectly makes persons on fixed incomes eligible for assistance and those on limited incomes. There is continual pressure to raise the assistance grants for the clients being served and for the vendors of

medical services and supplies, such as hospitals, nursing homes and physicians to charge higher fees as their costs increase. In the past few years the price increases for all medical services have far outstripped the overall increase in prices, as measured by the Boston C.P.I. as were the prices for all food items and housing costs, the principal components in the grant given to all families and persons receiving aid from the Department of Public Welfare.

Adjusted Expenditure for Medical and Assistance Programs for Price Changes, Total Expenditures and the Boston Consumer Price Index

Fiscal Years 1969-1978



Source: Expenditure data from Status of Appropriations Report, June 1978 and RSI, Consumer Price Index, U.S. Dept. of Labor, Bureau of Labor Statistics

Total Expenditures by Program

Fiscal Years 1974-1978

(In Million Dollars)

<u>Program</u>	<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>
All Programs	968.4	1132.6	1155.1	1245.8	1265.7
Medical Assistance	459.7	502.1	544.2	621.3	623.0
Aid to Families with Dependent Children	323.4	405.5	421.7	463.1(b)	486.7(b)
General Relief	82.0	111.7	82.3	45.6	41.8
Refugee Programs	1.5	1.3	1.8	1.8	2.0
Supplemental Security Income Program (a)(c)	54.7	112.0	105.1	114.0	112.1

a) SSI program began on January 1, 1974 and replaced both OAA and DA 1974-6 months)

b) Includes Emergency Assistance (0.5 million dollars)

c) State Supplement Only - Not total aid received by recipients

Total Expenditures by Program; Fiscal Years 1974-1978

Over the five year span from F.Y. 1974 to F.Y. 1978 total expenditures for all public assistance programs have steadily increased each year, but expenditures for individual programs have fluctuated with some increasing and some decreasing each year over the time period.

The largest increase over the time span, in percentage terms, were the expenditures for the Aid to Dependent Children Program which increased 50 percent due to both a greater number of families receiving assistance and increases in the budget standards and therefore the grants paid, due to changes in the cost of living. In absolute terms,

both the Aid to Families with Dependent Children Program and Medical Assistance expenditures increased by 163.3 million dollars over the five year period.

Expenditures for General Relief, which included both medical and non-medical vendor payments, showed great variation over the five years and in 1978 continued to decline as they did in F.Y. 1976 and F.Y. 1977 due to the limit on medical services provided, the decline in caseload due to the ineligibility of employable single persons and the decline in the caseload due to improved economic conditions. These factors along with greater administrative control have brought expenditures down over 49 percent from 1974 to 1978 and 62.6 percent from 1975 to 1978.

Compared to the expenditures for the AFDC program in Fiscal Year 1974, expenditures in Fiscal Year 1978 were up 50.4 percent. AFDC expenditures have increased each year since 1974 with the largest year to year increase in the 1974 to 1975 period. In Fiscal Year 1978 the year to year increase was just under \$24.5 million or 5.1 percent, bringing the total to 486.7 million dollars.

Expenditures for the Refugee Programs, which are 100 percent reimbursed by the Federal government, were up slightly from expenditures in F.Y. 1974. The increase of half a million dollars represented a 33.3 percent increase over the five year period. These programs include aid to displaced Cubans, Cambodians and Vietnamese refugees.

Assistance to the aged and disabled, which was provided under the Old Age Assistance and Disability Assistance Programs for the first half of Fiscal Year 1974 but in the second half assistance was provided under the Supplemental Security Income Program, a program administered

by the Social Security Administration. Comparisons between SSI and OAA and DA are almost impossible to make as the expenditures for OAA and DA included both the federal and state share, (which was on a 50-50 basis), while the expenditures listed for the SSI program are only the amount of state supplementation. In addition to the state supplementation the clients receive a federal minimum and/or other resources, especially Social Security payments.

The state share has actually increased from \$78.3 million for the two programs in Fiscal Year 1974 to 112.1 million dollars in Fiscal Year 1978. Over the period the combined caseload has increased from an average of 87,735 cases in 1974 to an estimated 128,266 cases, on the average, in Fiscal Year 1978.

TOTAL PAYMENTS BY PROGRAM
Fiscal Years 1968-1978
(In Million Dollars)

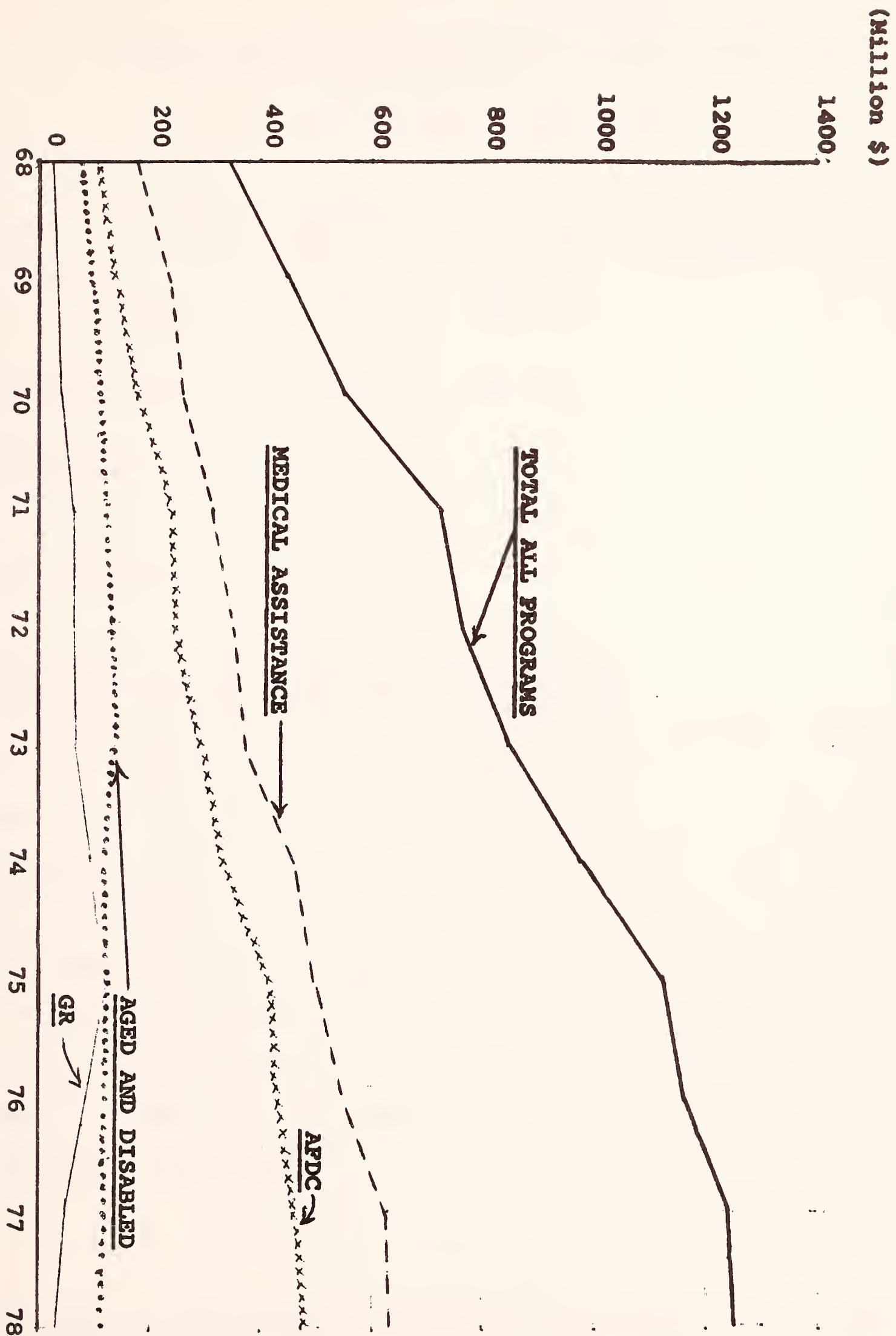
Fiscal Year	All <u>1/</u> Programs	Old Age and <u>2/</u> Disability Combined	Medical Assistance	Supplemental <u>2/</u> Security Income	Aid to Families With Dependent Children	General <u>3/</u> Relief
1968	358.8	63.5	189.9		91.7	13.7
1969	452.5	76.1	226.9		128.1	21.4
1970	564.0	102.2	252.9		172.8	36.1
1971	724.2	117.7	304.8		245.1	56.6
1972	772.0	128.4	348.5		239.8	55.3
1973	825.6	116.5	371.0		286.2	51.9
1974	966.9	47.1	459.7	54.7	323.4	82.0
1975	1131.3		502.1	112.0	405.5	111.7
1976	1153.5		544.2	105.1	421.7	82.3
1977	1244.0		621.3	114.0	462.6	45.6
1978	1263.7		623.0	112.1	486.8	41.8

1/ Does not include Refugee Programs, Social Services

2/ Data for OAA and DA in these years include both the Federal and State share. These programs were incorporated into the SSI programs for the Aged and Disabled on January 1, 1974. Data after that date under SSI includes only the State share of the expenditures.

3/ General Relief data includes all payments, Medical Vendor, Non-Medical Vendor and regular grants.

Expenditures by Program Fiscal Years 1968-1978



Source: RSI Data (1968-1972), Status of Appropriations Accounts (1973-1977)

Expenditures by Program, Absolute and Percent Change
Fiscal Years 1977-1978
(In Million Dollars)

<u>Program</u>	<u>F.Y. 1977</u>	<u>F.Y. 1978</u>	<u>Difference</u>	<u>Percent Change</u>
All Programs*	1245.3	1265.7	+ 20.4	+ 1.6
Medical Assistance	621.3	626.5	+ 5.2	+ 0.8
Aid to Families with Dependent Children	462.6	486.8	+ 24.2	+ 5.2
Supplemental Security Income Programs	114.0	112.1	- 1.9	- 1.7
General Relief	45.6	38.3	- 7.3	- 16.0
Refugee Programs	1.8	2.0	+ 0.2	+ 11.1

Expenditures by Program and Year to Year Change

Compared to Fiscal Year 1977, total Public Assistance expenditures in Fiscal Year 1978 were 1.6 percent higher and up 20.4 million dollars. The increase in 1977 over 1976, the previous fiscal year, was much higher with an increase of 7.9 percent and 90.7 million dollars. The table above shows that the 16 percent decline in General Relief and the 1.7 percent decline in SSI expenditures was more than offset by the 5.2 percent increase in AFDC expenditures and the 0.8 percent increase in Medical Assistance expenditures. Expenditures under the refugee programs increased slightly, in absolute terms, \$200,000, but the entire cost of the program is borne by the Federal Government.

* These data do not include expenditures for Social Services and Administration.

The increase in AFDC expenditures, in large part due to caseload increases were also the result of cost of living increases. The gain in Medical Assistance expenditures likewise can be attributed to these two factors although they were indirectly rather than directly responsible.

In percentage terms, the largest year to year increase was for the refugee programs, even though the caseload fell slightly. The next highest, or 5.2 percent increase for AFDC, was due to the higher caseload combined with higher benefits while the slight 0.8 percent increase for medical assistance was due to rate increases combined with a greater number of persons served.

Expenditures for the General Relief program fell 16 percent due in part to a caseload drop but also due to a drop in the average payment per case. The 1.7 percent drop in expenditures under the Supplemental Security Income program also resulted from a decline in the aged portion of the total caseload that more than offset the increase in disabled cases and these in turn are more liable to have higher resources resulting in a smaller SSI payment per case.

**Average Monthly Caseload by Program
and Year to Year Change, Fiscal Years 1977-1978**

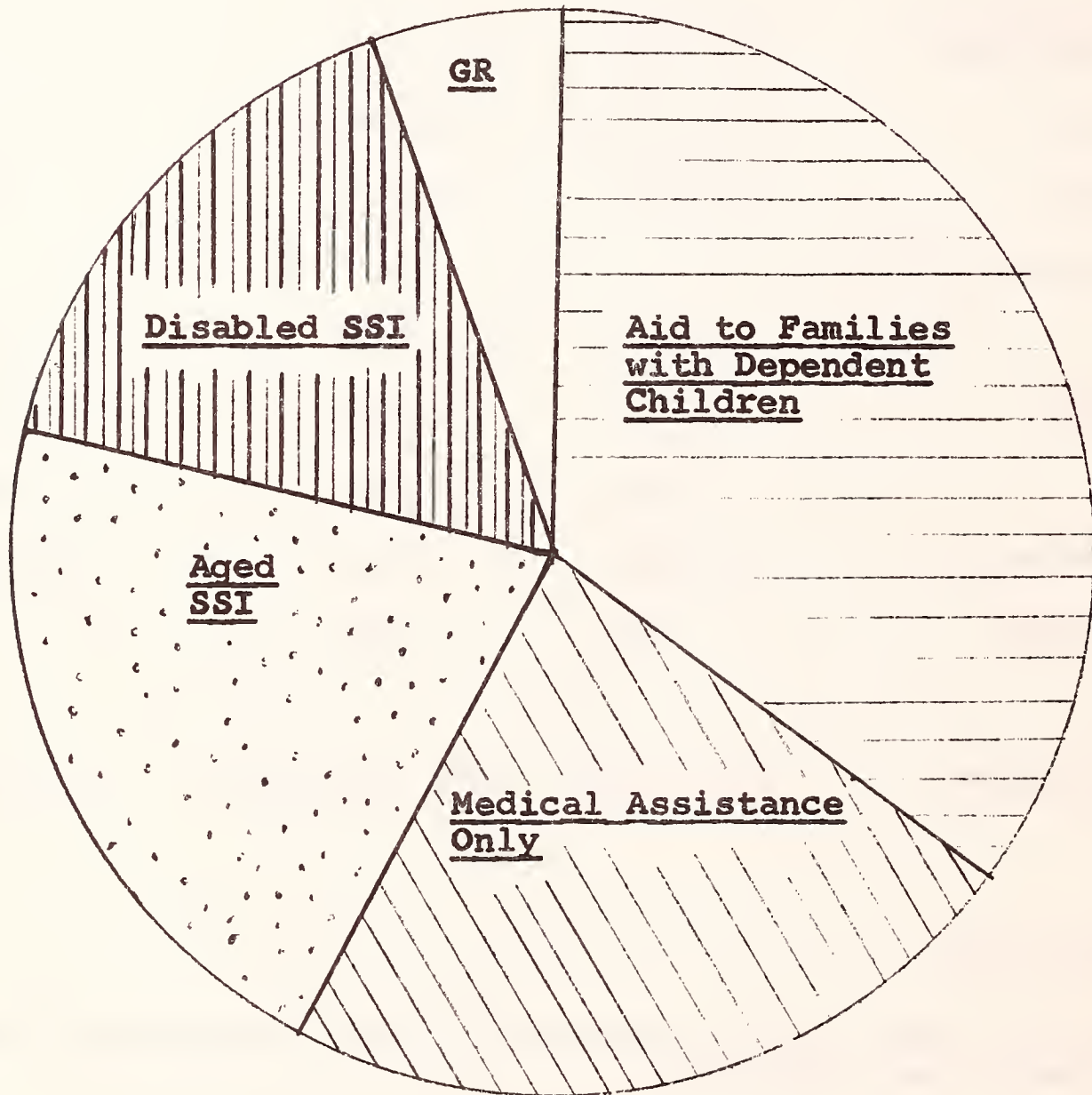
<u>Program</u>	<u>F.Y. 1977</u>	<u>F.Y. 1978</u>	<u>Difference</u>	<u>Percent Change</u>
SSI (Aged)	76,947(e)	73,224(e)	- 3,723	- 4.8
Aid to Families with Dependent Children	117,592	121,523	+ 3,931	+ 3.3
SSI (Disabled)	52,676(e)	55,286(e)	+ 2,610	+ 5.0
General Relief	21,669	20,704	- 965	- 4.5
Medical Assistance Only				
Aged	41,928	42,797	+ 869	+ 2.1
AFDC Related	8,298	10,016	+ 1,718	+ 20.7
Disabled	8,716	9,760	+ 1,044	+ 12.0
Children Under 21	19,948	17,818	- 2,130	- 10.7
Refugee Programs	401	396	- 5	- 1.2
Total, All Programs	348,175(e)	351,524(b)(e)	+ 3,349	+ 1.0

(e) Estimated data

(b) In addition there was an average of 73,325 non-public assistance food stamp cases each month.

Note: The source for these data is the Monthly Summary Expenditure Report for the Fiscal Years 1977, 1978, (except SSI data). This source is used for reasons of comparability over the long run. The SSI data is from the Department's Annual Report. The caseloads can be defined as the number of different cases who received or were eligible to receive assistance in the month, averaged for the year. The most recent source of caseload data for AFDC, GR and other programs except SSI is the Caseload and Expenditure Report which would give lower caseload figures as it gives the count of those cases that receive a regular grant in the month.

Distribution of the Public Welfare Caseload
by Program, Fiscal Year 1978



TOTAL AVERAGE MONTHLY CASELOAD: 351,128^{a/}

^{a/} Distribution based on average monthly caseload for the five major programs - Refugee, Food Stamps and Social Service caseloads not included.

Source: Caseloads based on the Monthly Summary Expenditure Report and Federal Report 8700 for SSI cases.

**Caseload by Program by Region
Public Assistance, June 1978**

<u>Region</u>	<u>AFDC</u>	<u>GR</u>	<u>MA-Aged</u>	<u>MA-AFDC</u>	<u>MA-DA</u>	<u>MA-Under 21</u>
Boston	27,887	7,077	6,029	1,579	1,870	3,023
Springfield	19,522	3,359	5,488	1,177	1,139	2,493
Worcester	13,221	1,312	4,615	887	1,267	1,667
Lawrence	24,693	3,849	10,692	2,447	2,354	3,442
Greater Boston	15,318	2,277	9,573	1,763	2,046	2,132
New Bedford	22,335	2,681	6,997	1,643	1,388	2,559
All Regions	122,976	20,555	43,394	9,496	10,064	15,316

Source: Monthly Summary Expenditure Report, June 1978

Caseload by Program by Region, June 1978

The table above shows the regional breakdown of the statewide caseloads by program for the last month in Fiscal Year 1978. The table is designed to show the relative size of the various regions and the regional difference in the breakdown of total caseload by program.

The total caseload for AFDC and MA disabled was higher in June 1978 than in June 1977 in the state as a whole and all the regions within the state. The medical program for Children Under 21 and General Relief showed a caseload drop from June to June in every region and the state as a whole, but while the caseload rose in the state for Medical Only-Aged and Medical Only-AFDC related the caseload in the Boston and Worcester regions fell from June to June and the AFDC-Related caseload fell in the Springfield and New Bedford regions.

Over a third of the General Relief cases are in the Boston Region while less than a quarter of the AFDC cases reside there. Over one-fourth of the Medical Only-AFDC cases are in the Lawrence Region and almost one-fourth of the MA-Aged cases, while this region accounts for only about 20 percent or one-fifth of the AFDC and GR cases.

It can be seen from the table above that great variations in the number and percent of cases by program exists in the different regions.

Applications and Closings by Program

Fiscal Year 1978

	<u>Program</u>		
	<u>AFDC</u>	<u>Medical Only</u>	<u>General Relief</u>
Applications Received	56,339	82,431	33,219
Applications: Approved	41,687	44,177	18,645
Denied	10,029	26,269	12,639
Other Dispositions	4,784	15,464	2,045
Cases Discontinued	41,069	-	23,053

Source: SRS-NCSS-2079I, DHEW, SRS Quarterly Report on Applications and Closings.

Applications and Cases Discontinued by Program

In fiscal year 1978 the Department received over 170 thousand applications for public assistance not including food stamps, social services and the refugee programs. For all the PA programs the number declined as the year progressed but even in the last quarter of the fiscal year 40,872 applications were received for the three major programs.

These applications, when added to the applications pending from the previous year, provided a total that had to be processed to determine whether the case was eligible or not. The rates differ widely from program to program but over-all, 104,509 or 68.1 percent of the applications processed were approved for assistance. The remaining third were denied for one reason or another. In addition, 22,293 applications were not processed because the application was withdrawn, the applicant moved or died, the Department was unable to locate the applicant and for other reasons of this nature.

Of those cases approved for money payments under AFDC, about 23 percent were cases that had been receiving assistance in the past six months, with the remainder being new cases. Only about 18 percent of the GR applications were for reopened cases.

Over the course of the year (Fiscal Year 1978) 41,069 AFDC cases and 23,053 GR cases were discontinued for money payments (closed). For AFDC this was 618 less than the number approved and for General Relief this was 4,408 more than the number of applications approved. Therefore we had a slight gain in the number of AFDC cases over the year and a large decrease in the number of GR cases active.

It will be noted that the largest number of applications was received for the medical assistance only program which also had the largest number and percent of denials. This outcome would be expected because eligibility for the direct payment programs is related to levels of income and assets; eligibility for the medical only programs is related to income, assets and the liability for medical services in relation to income.

MEDICAL ASSISTANCE

The Medical Assistance Program covers the needs of both the clients who are aided financially by the Department with direct (cash) payments, (Aged and Disabled SSI cases, AFDC, Refugee and GR cases), and those clients who have enough funds to maintain themselves but need assistance in paying for medical care and services, (Medical Only; Aged, Disabled, AFDC Related and children under 21 years of age in medically indigent families).

The following section will describe the types of medical care needed and provided, the expenditures for these different types of care and the average payments by different classifications with the utilization rates.

Medical Expenditures, Fiscal Year 1978

In the table on the next page the grand total expenditure exceeds the amount appropriated to the Department in Fiscal Year 1978 for medical care. This is because payments made from the appropriations of earlier years, (Accounts Payable), are included as well as funds appropriated to other departments that were included in the claim for matching funds under Title XIX for medical services given to welfare clients.

Title XIX expenditures are matched on a 50-50 basis with the Federal Government and are therefore separated out from funds expended for General Relief cases. Total funds distributed before matching, however, are given in this and other tables describing medical payments.

Total medical expenditures for both Title XIX programs and General Relief reached \$721,064,350 in Fiscal Year 1978. Included was \$94,532,283 for the aged in mental hospitals and the retarded in Intermediate Care Facilities under Title XIX and \$8.9 million in premium payments to a Health Maintenance Organization and the Social Security Administration for Supplementary Medical Insurance under Medicare.

Compared to Fiscal Year 1977, total expenditures in F.Y. 1978 for medical care increased 12.5 million dollars or 1.8 percent. Offsetting the \$3.2 million drop in expenditures under General Relief was the 16 million dollar increase in the expenditures under Title XIX. These increases were the result of rate adjustments and increases in the amount paid for services to the mentally retarded recipients receiving care from other state agencies. Higher unit costs and per diem rates also caused the expenditures to increase over those of the previous year.

The difference between total medical expenditure and total medical expenditures by type is due in part to the absence of insurance premium payments included in the total by type of provider and the fact that the total by type is based on monthly data not yet adjusted for changes in totals after that month. For these reasons the breakdown by type is described as estimated. The difference is about 5.8 million dollars or 0.8 of one percent.

TOTAL MEDICAL EXPENDITURES

Fiscal Year 1978

<u>Title XIX Accounts</u>	<u>Expenditure of Funds Appropriated for F.Y. 1978</u>	<u>Accounts Payable 1977</u>	<u>Total Expenditures</u>
Direct Medical Expenditures	\$496,068,493	\$ 1,128,491	\$497,196,984
Direct M.A. Allocation	96,290,809		96,290,809
Rate Adjustments	16,991,228	823,105	17,814,333
Prior Years	0	10,872,617	10,872,617
F.Y. 1976 Medical Assistance	<u>0</u>	<u>840,022</u>	<u>840,022</u>
Total Medical Assistance	\$609,350,530	\$13,664,235	\$623,014,765

Expended Under General Relief for Medical Care

From the 1978 Appropriation	\$1,987,420	
From 1977 Accounts Payable	905,487	
From 1977 Accounts Payable	<u>624,380</u>	
	\$3,517,287	\$ 3,517,287

Expended Under Title XIX from Other Appropriations

Department of Public Health for Intermediate Care Facilities for the Retarded	\$ 75,579,241
Department of Mental Health for Inpatient Hospital	<u>18,953,042</u>
Grand Total All Medical Funds Administered by the Department of Public Welfare in F.Y. 1978	<u>\$721,064,335</u>

Source: Status of Appropriation Accounts (June, 1978) and for other
Title XIX Appropriations the Federal Report SRS-NCSS-120

Estimated Medical Expenditures by Type of Provider

The table on the next page shows the way the funds for medical assistance were distributed to the various types of providers in fiscal year 1978.

By far the most costly service was inpatient hospital care in general hospitals which are defined as hospitals other than mental hospitals. In Fiscal Year 1978, this service alone accounted for 36.4 percent of all Title XIX expenditures and 23.5 percent of all General Relief expenditures for medical care. (Last year the percentages were 35.2 and 57.6 percent respectively). The decline in hospital care under General Relief in absolute and percentage terms reflects changes in policy on December, 1975, (the elimination of this type care).

Long term institutional care (Skilled Nursing Homes and Intermediate Care Facilities), accounted for an additional 39.2 percent of the total expenditures or \$280,168,000. Of this sum, Intermediate Care Facilities for the retarded accounted for \$75,579,000, for the regular welfare caseload, \$111,594,000 and Skilled Nursing Homes accounted for \$92,995,000.

Institutional care therefore, for both Title XIX and General Relief cases, and including hospital care, (mental and acute) and long term care, accounted for 78 percent of the total medical assistance payments or 560.4 million dollars. Compared to Fiscal Year 1977, the percentage has increased (from 76.7) and the total cost (from \$544 million last year).

The medical care segment of the consumer's price index has been rising faster than the index as a whole and this reflects the higher rates for hospitals and nursing homes. In addition, the increase in

funds to other agencies for the care of eligible welfare cases along with the increase in eligible cases in the regular caseload, together, has caused expenditures for institutional care to rise substantially over the past four years. These increases have been offset by the decline in GR expenditures for institutional care however, resulting in the proportion of total expenditures accounted for by the providers to remain relatively constant over the past few years and what increase there was can be accounted for by the increase in ICF payments for the retarded.

While the amount of funds given to the various other types of providers increased, the amount given for prescribed drugs, and to outpatient departments and other practitioners decreased in Fiscal Year 1978. They therefore received a much lower percentage of total funds Under Title XIX. While in Fiscal Year 1977 these three providers accounted for 10.2 percent of total medical expenditures; in Fiscal Year 1978 they accounted for only 9.5 percent.

In Fiscal Year 1977, physicians and dentists accounted for 7.9 percent of the total expenditures under Title XIX but with slight increases in absolute amounts they accounted for 8.1 percent of the total expenditures in F.Y. 1978. The amount and percent of the total medical expenditures remained about the same year to year for the other services (Clinic, Home Health, Lab. and Radiological) but the amount spent for family planning increased more than 75 percent and accounted for 0.5 percent of the total expenditures compared to 0.3 percent in Fiscal Year 1977.

**ESTIMATED MEDICAL EXPENDITURES
BY TYPE OF PROVIDER, TOTAL AND
PERCENT DISTRIBUTION**

Title XIX and General Relief
Fiscal Year 1978

<u>Type of Provider</u>	<u>Title XIX</u>		<u>General Relief</u>	
	<u>Expenditures</u> (000)	<u>Percent</u>	<u>Expenditures</u> (000)	<u>Percent</u>
General Hospitals	\$260,386	36.4	\$ 832	23.5
Mental Hospitals	18,953	2.7	-	
Skilled Nursing Homes	92,995	13.0	13	0.4
Intermediate Care Fac.				
For Mentally Retarded	75,579	10.6	-	
All Others	111,594	15.6	11	0.3
Physician Services	39,678	5.6	863	24.4
Dental Services	17,979	2.5	726	20.5
Other Practitioners Ser.	5,580	0.8	223	6.3
Outpatient, Hospital	36,578	5.1	51	1.4
Clinic Services	8,059	1.1	139	3.9
Laboratory and Radiological Services	3,099	0.4	61	1.7
Home Health Care	6,819	1.0	59	1.7
Prescribed Drugs	25,419	3.6	442	12.5
Family Planning	3,720	0.5	5	0.1
Other Care and Services	8,059	1.1	119	3.3
 TOTAL, All Providers	 \$714,497	 100.0	 \$3,544	 100.0

Source: Distribution based on Medical Vendor Payment Report VPS07 with adjustments as reported on Form NCSS-120. The distribution was then applied to Expenditure Data described in the June 1978 Status of Appropriation Accounts report

Estimated Recipients and Average Payments

The table that follows gives the estimated average number of recipients of medical care each month by program. Each recipient can be described as a person for whom at least one medical payment was made in the month and the count of recipients is unduplicated.

Great variations in the average payments by type of case are evident both between programs and from year to year, but overall the average payment for all recipients was up 11.7 percent from the average a year earlier. At the same time that total expenditures were rising about 1.1 million dollars per month the average number of recipients, especially AFDC recipients dropped dramatically. Each month in Fiscal Year 1978 the Department made at least one medical payment for an average of 380,295 persons. The average amount paid for each of these persons for all the medical services they received was \$156.57 each month but the average per person varied from program to program and ranged from \$54.86 for the AFDC program to \$632.34 for the Disabled Medical Only Program.

This great difference can be explained by the difference in the types of medical services received; the frequency of the services given and the other resources, especially medical, that the persons in these programs might have, such as Medicare or private insurance. Many disabled MA only cases are institutionalized whereas few AFDC mothers or children are in Nursing Homes or Intermediate Care Facilities. While many aged persons need medical care each day in the month or have long hospital stays or receive many types of medical care at the same time such as care by a physician, drugs and hospital care; the family cases are not so apt to have care to this degree or need care for chronic illnesses.

While the Disabled Medical Care Only cases had an average payment of \$632.34, the Aged MA Only cases had an average payment of \$504.24, also due to the large number of cases in Nursing Homes and ICFs as well as Chronic and Acute Hospital care. The cost to the Department is diminished however by the high percentage receiving Medicare benefits compared to the Disabled MA Only cases.

Average payments are higher for the Aged and Disabled MA Only cases than the SSI Aged and Disabled cases, who receive a money payment in addition to their medical care because the MA Only cases are more apt to have expensive institutional care. Most individuals would not be in the MA Only program unless they were in need of extensive medical care; especially expensive medical care. When an Aged or Disabled SSI case needs institutional care he or she is usually transferred from the SSI program to the Medical Care Only program, with few exceptions. Even if they remain at home, however, the average SSI Aged and Disabled case needs more medical attention than is needed for the average person under the children's programs; AFDC, AFDC-Related and Children Under 21 Years Old in medically indigent families. This is true even though the average payment to an SSI recipient is about \$350.00 per month less than the average for an adult program medical only case.

In both Fiscal Year 1977 and Fiscal Year 1978 the highest average payment was for the Disabled-Medical Only Recipient. From FY 1977 to FY 1978 the average payment increased \$102.49 per person per month. The average payment for all the other programs also increased significantly except the increase in the average payment for the Aged Medical Only program which rose only 0.3 percent or \$1.50 per month per recipient.

**Average Expenditure Per Recipient Per Month
for Medical Services by Category of Assistance^{1/}**

Fiscal Year 1978

<u>Program</u>	<u>Average Monthly Recipient Count</u>	<u>Average Monthly Expenditures</u>	<u>Average Monthly Expenditures Per Recipient</u>
Aged SSI	45,993	\$ 6,368,488	\$138.47
Disabled SSI	34,102	9,641,651	282.73
AFDC	206,737	11,339,474	54.86
Medical Only			
Aged	44,710	22,455,230	502.24
Disabled	10,337	6,536,469	632.34
AFDC Related	17,141	1,090,536	63.62
Under 21	21,275	2,109,686	99.16
Total, All Programs ^{1/}	380,295	\$59,541,534	\$156.57

1/ Only Title XIX, Federal Matched Programs are included.

Source: Recipient Counts from the NCSS Report 120 based on computer printouts VPS-38 and Expenditures from the NCSS Report 120 based on the VPS-07 printout.

Average Medical Expenditure Per Eligible Person

Compared to the average payment per recipient, the average payment for medical care per eligible person is much lower as not all the eligible persons actually have a medical payment made for them in the month. The utilization rate differs from program to program but in any one month only about two-thirds of the eligible persons have a payment made for them for all the programs combined.

A high percentage of the Aged and Disabled Medical-Only eligible persons actually have a payment made for them and as payments are made for cases no longer open, the rate can be more than 100 percent of the average caseload open for the month. (See Medical Care Utilization in the next section) For this reason there is little difference between the average payment per eligible person and per recipient for these programs, but the average payments are high for both programs and both types of case.

Because there is more than one person eligible in the family programs, AFDC, AFDC-Related and families with children under 21 years of age, medically indigent, even in the Medical-Only programs, there are usually more persons eligible than actually have medical needs. Therefore there is a large difference between the average medical payment per eligible person and the average medical payment per recipient. The other programs, General Relief and the SSI programs, are basically for income maintenance, with automatic eligibility for medical assistance, and therefore only a portion of the eligible persons actually have a medical payment made for them despite the fact that by definition they are disabled or older citizens.

These factors accounted for the difference of \$51.51 in the average payment for Aged SSI persons between the eligible persons and recipients and a difference of \$108.33 for the Disabled SSI clients, and a \$24.04 difference in the AFDC family programs. All these differences are greater than the differences experienced between per eligible and per recipient payments in Fiscal Year 1977.

The average medical expenditure per month per eligible recipient has increased just under ten dollars from the average last year for all the programs. Only the average payment per eligible person in the Adult programs and Children Under 21 Program actually rose , but they were more than enough to offset the decline in the average payment per eligible case per month in the other programs.

Estimated Average Medical Expenditure Per Month
Per Eligible Recipient by Category of Assistance

Fiscal Year 1978

<u>Program</u>	<u>Average Monthly Eligible Recipients</u>	<u>Average Monthly Expenditures</u>	<u>Average Expenditure Per Recipient</u>
Aged SSI	73,224 ^{1/}	\$ 6,368,488	\$ 86.97
Disabled SSI	55,286 ^{1/}	9,641,651	174.40
AFDC	367,880	11,339,474	30.82
Medical Only			
Aged	42,797	22,455,230	524.69
Disabled	9,760	6,536,469	669.72
AFDC Related	33,673	1,090,536	32.39
Under 21	34,439	2,109,686	61.26
General Relief ^{2/}	22,696	295,250	13.01
Total, All Programs	639,755	\$59,836,784	\$ 93.53

^{1/} Estimated

^{2/} Limited Medical Services Given

Source: Expenditure Data from the NCSS Report 120; Monthly Eligible Recipient Data from the MSER computer printout (monthly) and SSI caseload data from the Department's Annual Report, p. 32.

Medical Care Utilization Rates Per Eligible Recipient

The table which appears on the next page gives an indication of what percent of those people eligible to receive medical assistance actually have a medical payment made for them in the average month. The rate differs from program to program, but essentially the comparison shows that a relatively high proportion of the persons in the adult medical only programs, (MA-OAA and MA-DA), have at least one payment made for them in the average month. This stems from the fact that there was a medical need that caused them to apply for medical assistance in the first place. It is also probable that those cases closed, (a large percentage due to death), had outstanding medical bills that had to be paid after closing. Together these factors account for a utilization rate of greater than 100 percent.

Utilization rates were almost consistent for the other program with about 50 to 63 percent of the eligible persons having a payment made for them, regardless of whether they were in an adult program, with automatic medical eligibility (SSI-Aged, SSI-Disabled or GR), or in the family programs (AFDC-Related and Children Under 21) and regardless of whether they were automatically eligible or medical only cases.

Compared to last year the rates were substantially lower for the family cases but slightly higher for the adult cases. The greatest change was in the percent of AFDC Related recipients who had a payment made for them. The percentage fell from 61.3 to 50.9. Historically this program has the lowest utilization rate. A significant drop in the utilization rate for AFDC recipients was also experienced. The rate fell from 65.3 percent to 56.2.

The largest percentage increase was for the Disabled Medical-Only Program which rose from 92.2 percent to 105.9, with an increase in the average recipient count of 2,300 while the eligible caseload rose 1,044 cases, on the average, over the year.

Utilization Rates for Medical Care
Average Month by Program, Title XIX
Fiscal Year 1978

<u>Program</u>	<u>Average Monthly Eligible Recipients</u>	<u>Average Monthly Recipient Count</u>	<u>Percent of Persons Receiving Care</u>
Direct Payments			
Aged SSI	73,224 ^{a/}	45,993	62.8
Disabled SSI	55,286 ^{a/}	34,102	61.7
AFDC	367,880	206,737	56.2
Medical Only			
Aged	42,797	44,710	104.5 ^{b/}
Disabled	9,760	10,337	105.9 ^{b/}
AFDC Related	33,673	17,141	50.9
Children Under 21	34,439	21,275	61.8
Total, All Programs ^{c/}	617,059	380,295	61.6

a/ estimate

b/ Because medical payments are made for both open and closed cases utilization rate of greater than 100 percent is possible in the short run (1 year).

c/ Only Title XIX caseloads are included, General Relief is omitted.

Medical Assistance
Leading States in Expenditures and Recipients Under Title XIX
for Medical Care by Rank and Amount
April 1978

<u>State</u>	<u>Expenditure</u> <u>April 1978</u> (000)	<u>National</u> <u>Rank</u>	<u>Recipients</u> <u>April 1978</u>	<u>National</u> <u>Rank</u>
New York	\$279,484	1	824,943	2
California	209,701	2	1,414,401	1
Pennsylvania	120,319	3	391,260	4
Illinois	98,675	4	760,182	3
Michigan	76,466	5	382,044	6
Ohio	68,152	6	383,295	5
Texas	67,114	7	328,465	7
Massachusetts	63,225	8	272,896	9
Wisconsin	48,600	9	202,853	10
New Jersey	45,111	10	286,189	8
Minnesota	34,445	11	121,897	22
Georgia	28,251	12	183,429	12
U.S. Total	\$1,623,196		8,601,462	

Source: 'Medicaid Statistics', April 1978, DHEW Publication
(HCFA) 78-03150

Leading States in Medical Expenditures and Recipients

The table above describes the relative positions of the twelve leading states in the expenditures for medical care under Title XIX in April 1978. New York, California and Pennsylvania ranked 1st, 2nd and 3rd as they did the same month a year earlier but Massachusetts fell from sixth to eighth in the nation.

Total expenditures in Massachusetts for medical care fell from over 68 million dollars to over 63 million dollars while total medical expenditures in the nation rose from \$1,487 million in April 1977 to \$1,623 billion in April 1978. Caution should be used, however as only one month is used for comparison and payments under Medicaid tend to fluctuate from month to month.

Of the twelve leading states all but four showed a large increase in expenditures and one of the four was Massachusetts. These shifts changed the rankings of several states from year to year. Michigan and Illinois exchanged rankings as did Texas and Ohio, while Wisconsin moved from 11th place to 9th. Despite these changes though the same twelve states were the leaders in both April 1977 and April 1978.

Because of differences in the medical care programs the number of recipients in April in each state does not correlate with the amount of payments. While Minnesota is eleventh in expenditures, 21 other states had a higher number of recipients. Massachusetts was eighth in expenditures and ninth in the number of recipients which could be expected and the data shows that the 63 million dollars was paid for a total of 272,896 people who needed assistance with their medical care payments.

INCOME MAINTENANCE - PUBLIC ASSISTANCE

The following section describes in detail the various direct payment programs and food stamps including annual data for the Fiscal Year 1978, comparisons with Fiscal Year 1977, average payments per year and per month by program and to some extent the changes over time will be explained.

In Fiscal Year 1978 the most significant development as far as the income maintenance programs were concerned was the steady increase in the AFDC and SSI Disabled programs coupled with the slow but steady decline in the GR and SSI Aged programs. Food stamp caseloads, affected by the Blizzard of 1978 remained relatively stable with the decline in NPA food stamp cases offset by the increase in the PA food stamp caseload. In total both caseload and expenditure changes were relatively modest compared to past years.

All the income maintenance programs are administered by the Massachusetts Department of Public Welfare except the Supplemental Security Income Program (SSI) which is administered by the Social Security Administration, a federal agency, since January 1, 1974. It is still the responsibility of the Commonwealth to provide these aged and disabled cases with medical care and social services along with a share of their direct payments (grant). Before January 1, 1974 these cases were aided under the Old Age Assistance and Disability Assistance programs with the state's expenditures matched by funds from the federal government. At present, the Social Security Administration sends the basic grant to the recipient of SSI and later bills the Department for a portion of the total fund distributed.

The Food Stamp program caseload is divided into two parts. One part, the public assistance food stamp caseload is made up of cases that did not have to go through a separate application process as they are or were already receiving assistance in the form of a direct payment. The other type - Non-PA or non-public assistance cases are cases that do not receive a money payment except for the benefit gained by food stamp purchases. The table that follows in the food stamp section shows the division.

The only program not discussed in the following section is the program for refugees from Vietnam, Cambodia and Cuba. The state administers the program (for about 400 cases on the average each month) for the federal government, using AFDC standards. The entire cost of the program is reimbursed by the federal government.

AID TO FAMILIES WITH DEPENDENT CHILDREN

Comparison of Average AFDC Caseload and Expenditures Fiscal Years 1977-1978

	<u>F.Y. 77</u>	<u>F.Y. 78</u>	<u>Percent Change</u>
Average Monthly Caseload	117,592	121,523	+ 3.3
Average Monthly Recipient Count	367,644	367,880	+ 0.1
Total Expenditures (In Millions)	\$462.6	\$486.8	+ 5.2
Average Monthly Payment per Case	\$327.83	\$333.82	+ 1.8
Average Annual Exp. per Recipient	\$1,258	\$1,323	+ 5.2

AFDC Caseload and Expenditures, F.Y. 1978

While the average monthly caseload increased 3.3 percent, the increase in recipients, which includes children and adults in the AFDC family included in the grant, increased only 0.1 percent. This indicates that the average size AFDC family has been reduced in size. This is due perhaps to the decline in birth rate coupled with the increase in re-married AFDC mothers and pregnant women in the caseload.

Total expenditures increased 5.2 percent, compared to 9.7 percent a year earlier and was due to both the added number of cases over the year prior and the increase in budget standards which was reflected in higher grants. The standards were increased as a result of inflation and higher prices. The latter reason was also the cause of the 1.8 percent increase in the average monthly payment per case and the 5.2 percent increase in the average annual expenditure per recipient or \$65.00 per person per year.

The increase in caseload was less than the 5.1 percent increase from 1976 to 1977 and the increase in recipients was even less, (0.1 percent compared to 2.7 percent from 1976 to 1977). The increase in

expenditures was also lower in percentage and amount. Compared to most recent years the increase in expenditures from 1977 to 1978 was relatively small.

Over the 1978 Fiscal Year the caseload which started at 120,205 in July increased through the summer and fell in the fall and rose again sharply in the spring to reach a peak of 123,099 in May, 1978. In June the caseload fell slightly to just under 123 thousand cases.

Unlike the past two fiscal years the increase in caseload in Fiscal year 1978 was not due to a large increase in the Unemployed Fathers segment of the total AFDC caseload. This section increased only 4 percent, (compared to 28.2 percent in the previous year), while the basic component increased 3.3 percent. (See table on next page.) While the average number of unemployed father cases was at an all time high, the percent increase was the lowest in F.Y. 1978 since the 7.3 percent drop in Fiscal Year 1974. The economic recovery experienced in Fiscal Year 1976 and 1977 had little effect on the U.F. caseload but by Fiscal Year 1977 it was limiting the number of new cases and took full effect in Fiscal Year 1978.

Of the total AFDC expenditure about 21 million dollars was in the form of non-medical vendor payments. This was up about four million dollars from the Fiscal Year 1977 total but still far below the 34.6 million dollars expended in Fiscal Year 1975. This type of payment is used for emergency assistance; for example to replace items damaged by fire, protective payments and other payments for hardship cases.

WIN payments also were made to encourage and assist clients in the caseload to prepare for and engage in employment. Payments for this purpose, mostly to the Division of Employment Security, were just under \$750,000.

Total AFDC expenditures also include the Quarterly Special Needs Payments, often called the flat grant, in addition to the regular Direct Payments and Work Incentive Program expenditures. Emergency Assistance program payments are not included in the total. Funds given in the form of Special Needs payments were about 48 million dollars in Fiscal Year 1978.

AFDC Caseload by Type, 1969-1978

The following table will give some indication of how the caseload, in total and broken down into the Unemployed Fathers segment and regular (basic) segment has increased over the years since the Commonwealth assumed administration and the cost of the AFDC program. The percentage increase in 1978 for the total caseload was the smallest in at least the last ten years. Over the last nine years the total caseload has increased 165.0 percent while the Unemployed Fathers segment alone has increased 815 percent. The same period has seen the expansion in the program due to legislative changes, judicial decisions and changing social mores as well as economic change.

Aid to Families with Dependent Children

Average Monthly Caseload, Basic and Unemployed Fathers
and Percent Change from Prior Year, Fiscal Years 1969-1978

<u>Fiscal Year</u>	<u>Average Monthly Caseload</u>			<u>Percent Change from Prior Year</u>	
	<u>TOTAL</u>	<u>Basic</u>	<u>U. F.</u>	<u>Basic</u>	<u>U. F.</u>
1969	45,857	45,119	738	+ 24.2	+ 12.2
1970	56,932	55,424	1,508	+ 22.8	+104.3
1971	71,016	69,313	1,703	+ 25.1	+ 12.9
1972	79,618	77,433	2,185	+ 11.7	+ 28.3
1973	83,952	81,524	2,428	+ 5.3	+ 11.1
1974	91,738	89,487	2,251	+ 9.8	- 7.3
1975	106,124	102,968	3,156	+ 15.1	+ 40.2
1976	111,932	107,421	4,511	+ 4.3	+ 42.9
1977	117,592	111,808	5,784	+ 4.1	+ 28.2
1978	121,523	115,508	6,015	+ 3.3	+ 4.0

Source: RS-I System data (F.Y. 1969-1972), Monthly Summary Expenditure Report, (F.Y. 1973-1978).

Aid to Families with Dependent Children

Work Incentive Program

Oct. 1, 1977-Sept. 30, 1978 and Oct. 1, 1976-Sept. 30, 1977

	<u>Oct. 77-Sept. 78</u>	<u>Oct. 76-Sept. 77</u>
<u>Activity Summary</u>		
Number of Registrations	37,785	38,019
Number of Clients Interviewed and Appraised	21,566	27,982
Number Attaining Unsubsidized Employment	10,433	9,317
 Total Welfare Grant Reductions (Million \$)	 \$25.4	 \$14.4

Source: Internal memo from the WIN Unit based on data from the computer

WIN Activities - Oct. 77-Sept. 78

The data above describes certain WIN activities in two recent twelve month periods. The latter year, which corresponds with Fiscal Year 1978, shows that while the number of registrations has declined slightly and the number of clients interviewed and appraised, the number attaining unsubsidized employment increased by 1,116 or 11.2 percent and total welfare grant reductions increased 76.4 percent or 11 million dollars, reflecting increased efficiency by the WIN units. Over 23.5 thousand registrants were active in work or training programs in the same time period, with about eight thousand in various forms of training programs.

Work Incentive Program

Certifications, Initial, Completed and Not Completed by Reason
Oct. 1, 1976 to Sept. 30, 1977 and Oct. 1, 1977 to Sept. 30, 1978

<u>Certifications</u>	<u>Number</u>	
	<u>Oct. 77-Sept. 78</u>	<u>Oct. 76-Sept. 77</u>
Initial:		
Requested	15,480	15,015
Made with Service	2,779	3,454
Made without Service	11,742	10,070
Not Completed:		
Day Care not Available	116	541
Other Services not Available	114	79
Medical Exemption	193	89
Other Reasons	775	1,071

Source: Internam memo from the Work Incentive Unit based on ESARS

Work Incentive Program Certifications

The table above related to the certifications that the Department must give to the Division of Employment Security showing what social or other services will be provided or available so that a client could attend training classes for employment or what services they would need if they were employed. Most important is day care for the children in a family where the mother will be absent because of training or employment.

Aid to Families with Dependent Children

Average Payment Per Case by Rank, June 1977 and June 1978
Twelve Top Ranking States in June 1978

State	June 1978		June 1977	
	Average Payment Per Case ^{1/}	National Rank	Average Payment Per Case ^{1/}	National Rank
Hawaii	\$377.34	1	\$355.57	2
New York	375.09	2	367.19	1
Michigan	334.59	3	284.41	6
Massachusetts ^{2/}	319.63	4	300.87	3
California	317.56	5	291.42	5
Wisconsin	307.98	6	264.74	10
Connecticut	305.24	7	270.94	8
Alaska	297.79	8	296.91	4
Washington	297.44	9	243.60	17
Pennsylvania	289.84 ^{e/}	10	280.46	7
New Jersey	288.49	11	262.17	11
Minnesota	287.43	12	254.50	12
National Average	\$250.79	-	\$232.14	-

^{1/} Includes Non-Medical Vendor Payments

^{2/} Adjustments made for 1/3 of the Quarterly Special Needs Payment

^{e/} Estimate

Source: DHEW Publication No. 78-11917, ORS Report A-2 (6/78)
Public Assistance Statistics, June 1977 and June 1978

GENERAL RELIEF

Comparison of Average General Relief Caseloads, Expenditures and Payments, Fiscal Years 1977 and 1978

	<u>Fiscal Year</u>		<u>Year to Year</u>
	<u>1977</u>	<u>1978</u>	<u>Percent Change</u>
Average Monthly Caseload	21,669	20,704	- 4.4
Total Expenditures (In Millions)	\$45.6	\$41.8	- 9.3
Estimated Direct Payments (In Millions)	\$40.2	\$38.3	- 4.7
Average Annual Expenditure per Case	\$2,104	\$2,019	- 4.0
Average Monthly Direct Payment per Case	\$154.60	\$154.15	- 0.3

The 4.4 percent decline in the average monthly caseload for General Relief between Fiscal Year 1977 and Fiscal Year 1978, reflects improved management of the General Relief Program and the improvement in general economic conditions in the period. The caseload reached a peak in the spring of 1975 when over 44 thousand cases were being aided. A change in eligibility requirements in October 1975 had the effect of closing about 15,000 single person cases who were deemed employable. This factor along with improved economic conditions caused a substantial drop in the caseload during fiscal years 1976 and 1977. This decline, but at a slower pace, continued in Fiscal Year 1978. Except for a slight increase in December 1977 and March, 1978 the decline continued through every month in Fiscal Year 1978 ending with a caseload of 20,555 in June, 1978. The number of recipients likewise continued to drop over this time period.

Total expenditures also declined 3.8 million dollars, half of which was medical expenditure and half direct payments. The decline reflected the decline in caseload and in addition a lower monthly payment per case.

Expenditures for General Relief are now at their lowest point since Fiscal Year 1970. A very small percentage of total expenditures were for medical assistance in Fiscal Year 1978 however compared to earlier years. Of the total expenditures of \$41.8 million only 3.5 million was for medical care. In Fiscal Year 1975 of the total expenditure of 111.7 million dollars, \$43 million was for medical care.

Direct payments have also fallen with a decline in Fiscal Year 1978 of 4.7 percent or 1.9 million dollars to 38.3 million dollars. Of this approximately 2 million dollars was in the form of non-medical vendor payments. The decline in total direct payments more than kept pace with the decline in caseload, resulting in a lower monthly payment per case in Fiscal Year 1978 than in the prior year.

General Relief

Direct Payment Cases - Average Monthly Caseload and Percent Change from Prior Year, Fiscal Years 1969-1978

<u>Fiscal Year</u>	<u>Average Monthly Caseload</u>	<u>Percent Change from Prior Year</u>
1969	11,991	+ 29.4
1970	17,951	+ 49.7
1971	25,030	+ 39.4
1972	25,578	+ 2.2
1973	23,118	- 9.6
1974	26,860	+ 16.2
1975	40,025	+ 49.0
1976	29,989	- 25.1
1977	21,669	- 27.7
1978	20,704	- 4.5

Source: RS-I (1969-1972), MSER (1973-1978)

Direct Payment Cases, Fiscal Years 1969-1978

The table above shows that in Fiscal Year 1978 the average monthly caseload receiving General Relief direct payments has increased 72.7 percent from the average monthly caseload 9 years earlier or 8,713 cases. Compared to the year earlier, however, the caseload has fallen slightly after two large percentage drops experienced in Fiscal Years 1977 and 1976. The caseload is now only about half the size it was in Fiscal Year 1975. In Fiscal Year 1976 employable single persons were made ineligible and the economy started to turn around from its depressed condition. The other decline, experienced in Fiscal Year

1973 also resulted from significant administrative changes made in eligibility rules and management techniques. The decline in Fiscal Year 1978 was due in large part to better management and to a slightly improved economy with a reduced unemployment rate.

General Relief

Average Payment Per Case by Rank, June 1977 and June 1978
Twelve Top Ranking States in June 1978

<u>State</u>	<u>June 1977</u>		<u>June 1978</u>	
	<u>Average Payment Per Case</u>	<u>National Rank</u>	<u>Average Payment Per Case</u>	<u>National Rank</u>
Hawaii	\$257.97	1	\$263.91	1
Michigan	170.97	3	214.57	2
New York	197.26	2	198.12	3
Dist. of Columbia	165.91	4	165.20	4
Pennsylvania	162.17	7	161.31	5
Utah	162.61	6	160.26	6
New Jersey	160.14	8	160.23	7
Washington	113.76	17	157.37	8
Rhode Island	165.46	5	155.37	9
Massachusetts	134.54	11	149.31	10
Illinois	135.82	10	142.51	11
Connecticut	132.33	12	135.52	12
National Average (42 States)	151.47	-	156.17	-

Source: Public Assistance Statistics; DHEW Publication No. 79-11917

ORS Report A-2, June, 1977 and June, 1978

SUPPLEMENTAL SECURITY INCOME PROGRAM

Caseload and Payments, F.Y. 1977-1978

The table below shows the combined Aged and Disabled caseload and expenditures for the two fiscal years 1977 and 1978, the average payment per case per year and per month and the year to year percentage change in these factors.

	<u>F.Y. 1977</u>	<u>F.Y. 1978</u>	<u>Percent Change</u>
Average Monthly Caseload ^{e/}	129,623	128,510	- 0.9
Total Expenditures (In Millions)	\$114.0	\$112.1	- 1.7
Average Annual Payment per Case	\$879.47	\$872.31	- 0.8
Average Monthly Payment per Case	\$ 73.29	\$ 72.69	- 0.8

e/ Estimate

On January 1, 1974 the Old Age Assistance and Disability Assistance programs were incorporated into a new program administered by the Federal Social Security Administration and named the Supplemental Security Income Program.

The Commonwealth continues to assist aged and disabled Massachusetts residents aided under this new program by reimbursing the Federal Government for a share of the total assistance granted under the SSI program in Massachusetts.

In Fiscal Year 1978 the average monthly caseload combined, (both aged and disabled), declined by 1,113 cases each month on the average despite the winter storms in Fiscal Year 1978. The decline was caused by the decline in the aged portion which more than offset the increase in disabled cases.

Total reimbursement by the state to the federal government also declined by 1.9 million dollars. This decline was the result of a smaller caseload combined with greater resources of the caseload, on the average.

The average monthly payment for the combined caseload decreased just under one percent or 60 cents per month to \$72.69 per month, (872.31 per year), from Fiscal Year 1977 to Fiscal Year 1978. This seems to indicate that the average case had a smaller grant paid to them because they had higher social security payments and other resources. In addition the Disabled cases, which increased, are more likely to have resources in greater amount. The Aged are more likely not to have social security benefits or higher social security benefits.

Average Monthly Caseloads by Program

The table that follows shows the combined caseload broken down by type. The Aged caseload under the SSI program declined in Fiscal Year 1978 as it did in F.Y. 1977 for the first time since 1973. The Disabled portion continued to rise but the percentage increase was the smallest in the last ten years and the actual increase of 2,609 each month, on the average, was the smallest since Fiscal Year 1971. The increase in disabled cases from Fiscal Year 1977 to Fiscal Year 1978 was five percent.

The reason for the increase in the disabled portion appears to be that the definition of what is meant by disabled has changed over the years to become more inclusive while inflation has made many disability pensions obsolete or inadequate. Likewise the improved outreach through the use of the Social Security offices also had an effect.

The decrease in the number of aged SSI cases is because a greater percentage of persons over 65 years of age are eligible for full social security benefits rather than benefits based on only part of their working years. At that time wages were lower and there was less chance to accumulate assets and securities in addition to social security benefits.

Supplemental Security Income Program

Average Monthly Caseload, Aged and Disabled,
Fiscal Year 1970-1978 and Percent Change from Prior Year

<u>Fiscal Year</u>	<u>Average Monthly Caseload</u>			<u>Percent Change from Prior Year</u>	
	<u>TOTAL</u>	<u>Aged</u>	<u>Disabled</u>	<u>Aged</u>	<u>Disabled</u>
1970	72,032	55,347	16,685	+ 9.6	+ 8.4
1971	77,945	58,994	18,951	+ 6.6	+ 13.6
1972	84,905	62,737	22,168	+ 6.3	+ 17.0
1973	82,400	57,148	25,252	- 8.9	+ 13.9
1974 ^{a/}	87,735	58,081	29,654	+ 1.6	+ 17.4
1975	115,589	76,775	38,814	+ 32.2	+ 30.8
1976	127,459	80,500	46,959	+ 4.9	+ 21.0
1977	129,623	76,946	52,677	- 4.4	+ 12.2
1978	128,510	73,224 ^{e/}	55,286 ^{e/}	- 4.8	+ 5.0

e/ Estimate

a/ Data combines 6 months of OAA and DA with 6 months of SSI data. Prior to 1974 all data is for the Old Age Assistance and Disability Assistance Programs. After 1974, SSI data.

Source: MSER and RSI Series for data prior to January 1, 1974 January, 1974 and after from the Federal Report Form 8700 1978 (F.Y. data) from the Annual Report - p. 32.

Food Stamp Program

The Food Stamp Program, in its present form, began on July 1, 1974 and was designed to improve the diet of the indigent people of Massachusetts, especially the children. Depending on the resources of the food stamp recipients, a payment is made for the food stamps below their face value with the difference between the payment and the face value of the food stamps purchased described as the bonus value. This is the net gain to the food stamp household. All Public Assistance households that receive a cash grant are eligible for food stamps by definition, (with some exceptions), and other families may be eligible if they meet the financial and procedural requirements. These families are described as Non-Public Assistance Households (NON-PA). The "cost" of the bonus value is 100 percent borne by the United States Department of Agriculture.

Number of Households by Type

From its inception in its present form on July 1, 1974, the total number of food stamp cases continued to grow until the spring of 1976. At that time the total caseload tended to level off. While the number of public assistance food stamp cases continues to increase, especially during the winter, the number of non-public assistance cases continued to fall. The exception to this rule or trend was the large increase in both types of cases during and after the blizzard of 1978 in February. At that time the number of Non-PA cases increased more than 50 percent to 116,731 and the number of PA cases reached an all time high of 111,808 cases. By the end of Fiscal Year 1978 the number of Non-PA cases was at its lowest point in two years but the number of PA cases was a little higher than where it had been a year earlier.

The number of PA and Non-PA cases described in the table on the next page is the number of households that actually used the authorizations to purchase food stamps and not those eligible to receive food stamps.

Total Value and Bonus Value of Authorizations Utilized

For all the cases in the Fiscal Year 1978 over 264 million dollars in food stamps were authorized and purchased with the average case receiving \$117.41 in stamps each month in the year. The average household paid \$48.87 for the stamps, as therefore each household received, on the average \$68.54 as a bonus value or net gain each month.

The total bonus value over the year reached 154 million dollars, up slightly from the \$148.5 million given in Fiscal Year 1977. Except for the months during and after the storms in February the bonus value each has remained between 11.6 and 12.8 million dollars. The total value of stamps issued each month likewise remained relatively constant at between 20 and 22 million dollars except during the storms in the winter of 1978.

FOOD STAMP PROGRAM

Number of Households by Type and Total and Bonus Value of Authorizations Utilized

Fiscal Year 1978 by Month

<u>Month</u>	<u>Caseload</u>		<u>Total Value of Stamps</u>	<u>Bonus Issuance</u>
	<u>PA Cases</u>	<u>Non-PA Cases</u>		
July 77	104,290	71,319	\$20,943,416	\$11,653,482
Aug.	107,548	81,702	22,487,243	12,881,235
Sept.	103,440	76,615	21,275,993	12,128,736
Oct.	109,569	80,433	22,386,549	12,725,971
Nov.	104,850	76,310	21,288,584	12,149,718
Dec.	106,907	79,326	21,715,782	12,462,529
Jan. 78	103,808	75,753	20,867,283	12,292,106
Feb.	108,864	116,731	25,777,600	16,859,288
Mar.	111,808	89,819	23,744,140	14,094,044
Apr.	108,979	80,662	22,717,077	13,272,598
May	104,404	71,073	20,818,914	12,104,906
June	107,323	69,283	20,252,479	11,640,593
Total F.Y. 1978	-	-	\$264,275,060	\$154,265,206

Source: FNS-256 Computer Printout "Food Stamp Participation Report"

SOCIAL SERVICES

Expenditures by Program, Fiscal Year 1978

<u>Program</u>	<u>Amount of Expenditure</u>
Care and Maintenance of Children	\$37,706,293
Day Care (Contracted and Non-Contracted)	26,525,292
Donated Funds Program	9,912,333
Services to the Elderly and Disabled	3,509,559
Services to Children in Crisis	3,122,022
Tuition and Transportation	2,413,423
Protective Services for Children	2,305,820
Family and Children Services	2,163,664
Family Planning	1,387,334
Emergency Services	426,454
Health and Safety of Day Care Centers	52,403
Total All Social Services	\$89,524,597

Source: Status of Appropriations Accounts, June 1978

Social Service Expenditures by Program, F.Y. 1978

The table above lists the various expenditures for social service programs as distinct from Income Maintenance and Medical Assistance program expenditures.

Some expenditures relative to the administration of social service programs are listed under Administration, as described in the next section of this report. They include administration of the Donated Funds Program which in 1978 was \$382,910, administration of the Protective Services Program (\$1,165,991) and the administration of the Social Service Unit which was \$631,694 in F.Y. 1978. Other administrative

costs for the delivery of social services, especially the cost of administering the Care and Maintenance Program, will be described in the next section.

The program requiring the largest expenditure was the Care and Maintenance of Children Program which is for children placed under the care of the Department. Compared to the year before, expenditures for for this program were up about 3 million dollars or 8.4 percent. The expenditures provide foster care and group care for children for whom an application was made to the Department or who were referred to the Department by the courts. Other children in this program are in adoptive homes, with relatives or with their own parents but receive some form of care and supervision.

The next largest expenditure was for day care, both contracted and non-contracted. This day care takes many forms from baby-sitting to placement in Day Care Centers and enables mothers to work and partially support the family while the child is under supervision and care or for the mother to receive medical treatment, etc. In Fiscal Year 1978 expenditures for this type of care declined slightly from the year before.

Expenditures under the Donated Funds Program increased slightly over the prior year. This program is designed to provide social services without direct financial participation of the Welfare Department which only acts as a funnel for federal funds. Private agencies provide 25 percent of the cost of a particular social service provided while federal funds provide the remaining 75 percent.

Services to the elderly and disabled have fallen from \$11.5 million in Fiscal Year 1977 to \$3.5 million in Fiscal Year 1978 as many of the

functions and costs have shifted from the Department of Public Welfare to the Office of Elder Affairs. The latter agency is now designated as the provider of most services to the elderly. These services include homemaker and housekeeper services, chore services, transportation and some day care.

Social Services to Families and Children are similar to those described above and are used in many cases as an alternative to foster placement and involve services designed to keep the family intact. Family Planning Services include counseling, medical and educational services to low income families. Unwed mothers are also assisted under this program and are provided with child care training and counseling.

Expenditures for the Protective Services for Children enabled the Department to provide casework services, such as investigations and counseling, to abused and neglected children and to their parents. Emergency and overnight placement are also made under this program. Compared to Fiscal Year 1977, expenditures under this program more than doubled as the number of referrals and requests for services increased at a rapid rate during the year.

Services to Children in Crisis have increased over the past Fiscal Year 1978 and expenditures for this program increased more than 50 percent. These services are designed to prevent adolescent children from entering the correctional system by preventing conduct that would lead to that end.

The Tuition and Transportation Account is for the children under the care of the Department. The Department reimburses the cities and

towns where these children reside for their education and school busing costs. Last year there were no expenditures under the account for the first time in recent years but expenditures have resumed after litigation on this question.

In addition to the expenditures described above, Emergency Services were provided and expenditures made for the health and safety of day care centers. Not included in the list of social services expenditures was the \$733,270 spend under the Work Incentive Program which was included under the AFDC account. These funds were used in an effort to place AFDC clients in employment or training for employment situations. These funds were used in conjunction with federal funds for job counseling, testing, placement and follow-up. In these respects they take on some of the aspects of social services and in conjunction with these services actual social services have to be given such as Day Care. A description of these services is described under the AFDC section in this report.

**Child Welfare Expenditures by Type, Fiscal Years 1977-1978
and Year to Year Percent Change**

<u>Type</u>	<u>Fiscal Year</u> <u>1978</u> (\$)	<u>Fiscal Year</u> <u>1977</u> (\$)	<u>Year to Year</u> <u>Change</u> (%)
Total, All Types	40,119,715	-	-
Care and Maintenance	37,706,292	34,698,330	+ 8.7
Board Payments	35,108,898	32,318,231	+ 8.6
Clothing	2,181,996	2,224,204	+ 2.6
Other	315,398	155,895	+102.3
Tuition and Transportation	2,413,423	-	-

Source: Raymonds Trial Balance, 1978 Fiscal Year and 1977 Accounts Payable Summary of Expenditures Report, June 1978.

Child Welfare Expenditures, Fiscal Year 1978

The table above shows the year to year changes in the various types of expenditures made for the Child Welfare Program (Care and Maintenance), from Fiscal Year 1977 to Fiscal Year 1978. The percent change for all types of care and maintenance shows an 8.7 percent increase in large part to the higher per diem costs for children in Group Care Facilities.

The increase in Board Payments, which include both payments to non-medical institutions (Group Care Facilities) and foster mothers for the care of children who are under the supervision of the Department, reflects high group care rate increases and other inflationary tendencies. This likewise explains the increase in clothing expenditures. Board Payments are for the complete care of the child in a foster or group care home and are not just for food. Included is housing, personal needs

and those items furnished by any parent for his or her child. In some cases this includes the work of professional counselors, educators and therapists in the group care setting.

Child Welfare expenditures have been rising each year since 1970 with the exception of Fiscal Year 1973 when total expenditures fell about 1.4 million dollars and voluntary referrals were brought under control and limited.

In Fiscal Year 1978 approximately 9,300 children were aided under the Care and Maintenance account. Of those approximately 7,400 were in foster homes and adoptive homes and 1,800 in Group Care Facilities. More than half the funds however were used for the children in a group care setting.

In the table above the 2.4 million dollars for Tuition and Transportation is for more than one fiscal year. This account was not active in Fiscal Year 1977 but in the prior year (F.Y. 1976), \$801,000 was expended and prior to that about 1.7 million dollars each year.

ADMINISTRATION

The table that follows shows a breakdown of the total administrative costs of the Department of Public Welfare, by type, in Fiscal Year 1978. The section that follows describes changes in administrative costs of the Department over the years with additional data on some aspects of those administrative costs.

Almost 89 million dollars was spent to administer the programs of the Welfare Department, which in Fiscal Year 1978 accounted for an expenditure of over 1.3 billion dollars. In other words only 6.6 percent of the total expenditures by the Department of Public Welfare were used to administer the many costly and complex programs.

Compared to last year, the administrative costs were up almost 7.5 million dollars. This increase was due to the large increase in regular administration caused by added wage and price increases. In addition there was added training expense and a large increase in the Food Stamp Program administrative costs. The percent of administrative costs to total expenditures increased from Fiscal Year 1977 and went from 5.5 percent in Fiscal Year 1977 to 6.6 percent in Fiscal Year 1978.

In the previous fiscal year, regular administration was just over 61 million dollars whereas in this year, (Fiscal Year 1978), regular administration was almost 67 million dollars. Funds from this account are used for the salaries of social workers and supporting staff, the purchase of supplies and equipment, and rent and utility payments needed for the regular programs that are not separated out in the table that follows. The six million dollar increase was therefore a reflection of the increased costs for those goods and services that have been increasing in price as the cost of living rises.

The vendor payment system was designed to process the payment of invoices submitted by suppliers of services and goods, especially providers of medical care, in a timely and efficient manner. Compared to last year expenditures fell slightly while the total dollar figure of claims processed increased significantly.

Administrative expenditure for the Food Stamp Program increased 1.5 million dollars from the 5.5 million dollars expended in Fiscal Year 1977. These funds are used for the processing of applications for food stamps, to cover the cost of the distribution of the food stamps and for the computer system for making the authorizations used in the purchase of stamps and related expenses.

The Hospital Admission Surveillance System or HASS is a system designed to insure that the medical assistance clients receive the optimum amount of care in hospitals and that hospital care is the most appropriate form of medical care for each experience, illness or disability. It also insures that the hospital patient will be discharged from the hospital at the proper time. In Fiscal Year 1978, expenditures for this system were almost \$700,000 less than in Fiscal Year 1977.

The Child Support Enforcement Unit was created to maximize the amount of child support payments collected by the Department from the legal parents of children receiving assistance. The specialized unit was created in Fiscal Year 1975 although the procedures had been in effect many years as part of the functions of the regular social work staff. Collections in Fiscal Year 1978 were in excess of 29 million dollars compared to 23 million dollars in Fiscal Year 1977. Administrative expenses in Fiscal Year 1978 were 1.9 million

dollars compared to 1.3 million dollars in Fiscal Year 1977 for this particular unit.

In Fiscal Year 1977 a new unit was created to perform services that had been given in the past by the regular social workers. This unit was designed to give protective services to clients as a result of the increased number of referrals to the Department. In Fiscal Year 1978 expenditures for this unit increased to \$1,165,991 as the number of referrals and investigations increased tremendously.

The Social Service Administrative Unit was created to control the supply and purchase of social services by the Department for welfare clients. Expenditures for this unit in Fiscal Year 1978 decreased about 21 thousand dollars below those of Fiscal Year 1977 while expenditures for the Donated Funds Administrative Unit increased about 31 thousand dollars. The Donated Funds Administrative Unit is responsible for the management of the programs financed by the Donated Funds Program. Funds are donated to the Department, matched by the federal government on a 3 to 1 basis and the total used to provide services that would otherwise not be available as direct state funding is severely limited.

Expenditures for the three social services administrative units, (Protective, Donated Funds and Regular), could also be listed under Social Services but as they are financed for the management of the programs rather than for the services themselves, it is perhaps more accurate and informative to list them under administrative costs.

Regular Administration, which increased about 5.7 million dollars in Fiscal Year 1978, accounted for 78.8 percent of total administrative

costs compared to 79 percent the year before; the Vendor Payment System accounted for 7.3 percent of the administrative costs in Fiscal Year 1978; the Food Stamp Program Administration accounted for 8.3 percent and the remaining types of administrative costs, 5.6 percent of the total.

Expenditures for Administration by Type
Fiscal Year 1978

<u>Type of Expenditure</u>	<u>Amount</u>	<u>Percent of Total</u>
	(\$)	(%)
Regular Administration of the Programs	\$66,879,941	78.8
Vendor Payment System	6,192,538	7.3
Food Stamp Program - Administration	7,040,730	8.3
Child Support Enforcement Unit	1,932,824	2.3
Hospital Admission Surveillance Sys.	573,222	0.7
Protective Services Unit	1,165,991	1.4
Social Services Administration	631,694	0.7
Donated Funds Administration	382,910	0.5
Training and Other	81,905	0.1
 Total, All Types	 \$84,881,756	 100.1

Source: Status of Appropriation Accounts, June 1978

Expenditures adjusted for accounts payable, F.Y. 1977

Appendix I
 Consumer Price Index^{/1}
 Boston, Mass., All Items - Series A

(1967 = 100)

<u>Year</u>	<u>Jan.</u>	<u>Apr.</u>	<u>July</u>	<u>Oct.</u>	<u>Average</u>
1969	106.8	108.3	110.3	112.4	110.0
1970	113.6	115.1	116.4	119.4	116.7
1971	120.7	121.6	122.7	124.3	122.7
1972	124.8	126.2	127.0	128.9	127.1
1973	129.7	132.4	134.1	138.7	134.7
1974	142.0	145.2	149.7	153.0	148.7
1975	156.4	159.0	163.0	164.8	162.1
1976	171.9	172.5	175.3	176.1	174.5
1977	178.9	181.6	184.5	185.7	183.4
1978	187.5 ^{/u}	187.6 ^{/u}			

/1 For Urban Wage Earners and Clerical Workers

/u Unrevised Series for U.W.E. and C.E.

Source: U.S. Dept. of Labor, Bureau of Labor Statistics,
 Washington, D.C. 20012

APPENDIX II

Caseload by Program By Welfare Service Office, Region and State June 1978

	<u>Medical Only</u>					
	<u>AFDC</u>	<u>GR</u>	<u>Aged</u>	<u>AFDC Related</u>	<u>Disabled</u>	<u>Children Under 21</u>
<u>Total State</u>	122,976	20,555	43,394	9,496	10,064	15,316
<u>Boston Region</u>	27,887	7,077	6,029	1,579	1,870	3,023
Hawkins Street	28	33	12	9	12	8
East Boston	2,032	526	0	0	0	17
Church Street	1,763	1,348	0	2	2	45
Roxbury Crossing	5,426	1,349	2	0	5	78
Hancock Street	3,582	402	2	7	0	58
Adams Street	4,578	762	0	0	0	53
Inst. & Nurs. Homes	0	0	3,958	2	587	1
Columbia Point	333	34	0	0	0	19
West Howell Street	1,473	733	0	0	0	17
"D" Street	362	82	0	0	0	5
Morton Street	1	23	0	0	0	0
So. Huntington Ave.	757	17	0	0	0	11
Roslindale	1,853	12	0	0	0	12
Medical Assist. Only	0	1	2,053	1,554	1,263	2,566
Grove Hall (Family)	5,699	1,376	2	5	1	109
Westview Street	0	409	0	0	0	24
<u>Springfield Region</u>	19,522	3,359	5,488	1,177	1,139	2,493
Adams	914	116	380	117	86	191
Athol	470	41	121	43	30	68
Chicopee	1,434	129	454	54	84	141
Gt. Barrington	188	16	220	27	23	33
Greenfield	1,045	155	345	108	53	180
Holyoke	2,264	351	724	126	141	338
Northampton	1,233	266	504	114	130	179
Palmer	434	33	102	39	24	64
Pittsfield	1,608	327	499	196	70	286
Springfield	8,139	1,709	1,488	221	378	729
Westfield	942	90	229	44	68	134
West Springfield	851	126	383	88	52	150
Other	0	0	39	0	0	0

APPENDIX II (cont.)

	<u>Medical Only</u>					
	<u>AFDC</u>	<u>GR</u>	<u>Aged</u>	<u>AFDC Related</u>	<u>Disabled</u>	<u>Children Under 21</u>
<u>Total Worcester Region</u>	13,221	1,312	4,615	887	1,267	1,667
Clinton	408	39	150	31	24	66
Fitchburg	1,625	157	419	99	99	194
Leicester	253	26	47	31	26	41
Leominster	652	157	36	35	82	0
Medway	1,098	68	410	115	136	162
Northbridge	887	123	427	101	139	171
Shrewsbury	212	16	140	16	15	12
Southbridge	1,939	181	558	133	129	193
Templeton	889	87	363	109	143	138
Worcester	5,258	615	1,944	216	521	608
 <u>Total Lawrence Region</u>	 24,693	 3,849	 10,692	 2,447	 2,354	 3,442
Amesbury	755	47	284	53	73	62
Beverly	698	101	338	49	48	72
Billerica	510	38	238	78	42	73
Chelmsford	198	32	169	11	21	19
Chelsea	1,301	179	202	56	53	130
Dracut	316	33	101	38	21	40
Everett	1,052	168	381	94	110	109
Georgetown	130	2	35	22	10	22
Gloucester	725	105	349	98	69	154
Haverhill	1,440	241	697	72	97	268
Lawrence	2,722	466	908	471	203	477
Lowell	3,289	491	1,098	149	215	327
Lynn	3,789	712	1,156	265	308	547
Malden	1,341	312	694	171	207	152
Medford	912	110	412	144	121	208
Melrose	246	37	198	60	25	38
Methuen	559	69	334	64	64	72
Newburyport	353	66	256	31	40	50
No. Andover	125	11	173	16	21	26
Peabody	812	99	601	96	127	152
Reading	427	82	294	112	62	86
Revere	1,133	203	529	101	189	122
Salem	1,056	123	306	53	77	87
Tewksbury	234	41	292	47	70	40
Wakefield	231	18	206	28	33	35
Westford	78	3	69	11	6	13
Winthrop	261	60	316	57	42	61
Other	0	56	0	0	0	0

APPENDIX II (cont.)

	Medical Only					
	<u>AFDC</u>	<u>GR</u>	<u>Aged</u>	<u>AFDC Related</u>	<u>Disabled</u>	<u>Children Under 21</u>
<u>Total Gr. Boston Region</u>	15,318	2,277	9,573	1,763	2,046	2,132
Arlington	398	89	250	33	63	43
Brookline	360	112	421	12	89	79
Cambridge	1,967	397	784	284	218	340
Concord	442	33	200	23	47	47
Dedham	246	14	98	63	16	42
Framingham	1,097	148	844	106	105	168
Newton	535	55	791	82	97	93
Hingham	295	33	300	37	38	28
Hudson	150	11	66	11	14	19
Marlborough	774	76	647	71	114	118
Natick	236	36	210	26	46	28
Norwood	930	110	881	246	179	195
Quincy	1,963	307	1,268	116	318	164
Randolph	298	27	192	28	33	24
Somerville	2,224	377	652	158	244	345
Waltham	859	148	521	109	143	125
Watertown	311	42	269	30	23	34
Weymouth	1,301	144	468	135	89	105
Wilmington	194	14	48	28	19	16
Woburn	738	104	526	115	101	119
Other	0	0	137	0	0	0
 <u>Total New Bedford Region</u>	 22,335	 2,681	 6,997	 1,643	 1,388	 2,559
Attleboro	1,425	165	474	102	95	166
Barnstable	1,206	101	477	160	104	323
Brockton	5,498	637	1,852	165	265	367
Fall River	3,621	620	1,186	280	207	419
Fairhaven	520	41	272	41	34	96
Falmouth	839	119	247	98	45	177
Marshfield	968	108	242	226	99	226
Nantucket	64	13	53	12	5	17
New Bedford	4,141	476	1,002	224	220	289
Oak Bluffs	91	5	57	21	27	68
Orleans	450	56	145	41	27	102
Plymouth	899	91	196	107	89	236
Taunton	1,940	204	574	136	162	236
Wareham	673	45	112	30	30	61
Other	0	0	108	0	0	0

Appendix III

Non-Public Assistance Food Stamp Caseload by Region and Welfare Service Office June 1978, June 1977 and July 1976

	Caseload		
	<u>June 78</u>	<u>June 77</u>	<u>July 76</u>
<u>Boston Region</u>			
Hawkins Street	0	4	3
East Boston	1,660	2,177	2,106
Church Street	1,345	1,433	1,163
Roxbury Crossing	3,328	5,516	4,738
Hancock Street	1,607	1,510	1,105
Adams Street	1,406	3,483	2,868
Grove Hall (Adult)	0	1	21
Inst. & Nurs. Homes	0	4	11
Columbia Point	0	7	8
West Howell Street	879	997	674
"D" Street	0	7	6
Morton Street	1,170	36	24
So. Huntington Ave.	0	47	15
Roslindale	0	61	38
Medical Assist. Only	0	0	0
Grove Hall (Family)	706	989	664
Westview Street	0	4	0
<u>Springfield Region</u>			
Athol	234	399	74
Adams	285	509	520
Chicopee	576	773	764
Gt. Barrington	214	242	179
Greenfield	841	1,274	1,464
Holyoke	757	1,089	957
Northampton	2,300	2,628	2,407
Palmer	165	337	551
Pittsfield	1,075	1,315	823
Springfield	2,465	2,941	2,552
Westfield	331	658	613
West Springfield	476	414	748
Other	0	0	0

	<u>Caseload</u>		
	<u>June 78</u>	<u>June 77</u>	<u>July 76</u>
<u>Worcester Region</u>			
Clinton	254	303	294
Fitchburg	781	1,144	1,093
Leicester	0	6	362
Leominster	314	346	425
Medway	836	804	896
Northbridge	573	599	790
Shrewsbury	0	10	351
Southbridge	418	676	1,126
Templeton	3,263	3,660	3,793
Worcester			
<u>Lawrence Region</u>			
Amesbury	296	427	577
Beverly	434	568	585
Billerica	449	564	693
Chelmsford	125	228	191
Chelsea	401	397	422
Dracut	305	381	462
Everett	585	713	663
Georgetown	112	156	161
Gloucester	697	913	1,071
Haverhill	568	833	940
Lawrence	980	1,634	2,386
Lowell	1,442	2,447	2,593
Lynn	1,387	1,588	1,602
Malden	608	680	661
Medford	656	849	793
Melrose	275	363	421
Methuen	316	471	469
Newburyport	183	245	358
No. Andover	95	132	173
Peabody	688	977	1,059
Reading	490	506	531
Winthrop	350	232	328
Revere	731	665	698
Salem	465	539	494
Tewksbury	309	397	472
Wakefield	189	182	207
Westford	95	88	94

Caseload

	<u>June 78</u>	<u>June 77</u>	<u>July 76</u>
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Gr. Boston Region

Arlington	407	400	410
Brookline	647	777	738
Cambridge	1,643	2,320	2,440
Concord	302	381	560
Dedham	240	542	503
Framingham	347	608	663
Newton	558	507	500
Hingham	289	422	370
Hudson	107	152	164
Marlborough	488	803	757
Norwood	738	615	743
Quincy	1,779	2,043	1,865
Randolph	301	424	431
Somerville	1,051	1,536	1,630
Waltham	560	866	703
Watertown	238	305	310
Weymouth	824	893	1,046
Wilmington	170	219	231
Woburn	735	1,042	1,143
Natick	140	374	319

New Bedford Region

Attleboro	343	521	860
Barnstable	633	586	771
Brockton	2,293	2,751	3,070
Fall River	871	1,066	1,032
Fairhaven	254	207	260
Falmouth	613	966	927
Marshfield	836	1,152	730
Nantucket	58	84	64
New Bedford	924	1,160	1,457
Oak Bluffs	44	124	161
Orleans	478	484	502
Plymouth	754	916	1,003
Taunton	1,132	1,329	2,297
Wareham	339	410	634
Rockland	-	-	902

